



ORACLE  
NetSuite **OpenAir**

# Optional Features



2024.1

July 24, 2024



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# Optional Features Overview


OpenAir is highly configurable. Account administrators can configure the company settings to tailor OpenAir according to company business processes. See the  [OpenAir Administration Guide](#) for details.

OpenAir Professional Services can set the necessary configuration initially when your OpenAir account is deployed. If you decide to take advantage of additional functionality, you can create a support ticket and request for OpenAir Customer Support to enable any of the available optional features.

This guide describes the optional features that can be enabled on your account for each OpenAir module.

- [Requesting a New Feature by Creating a Support Case](#)
- [Global](#)
- [Timesheets](#)
- [Expenses](#)
- [Projects](#)
- [Resources](#)
- [Invoices](#)
- [Reports](#)
- [Platform](#)
- [NetSuite Connector](#)
- [Workspaces](#)
- [Security](#)
- [Release History](#)

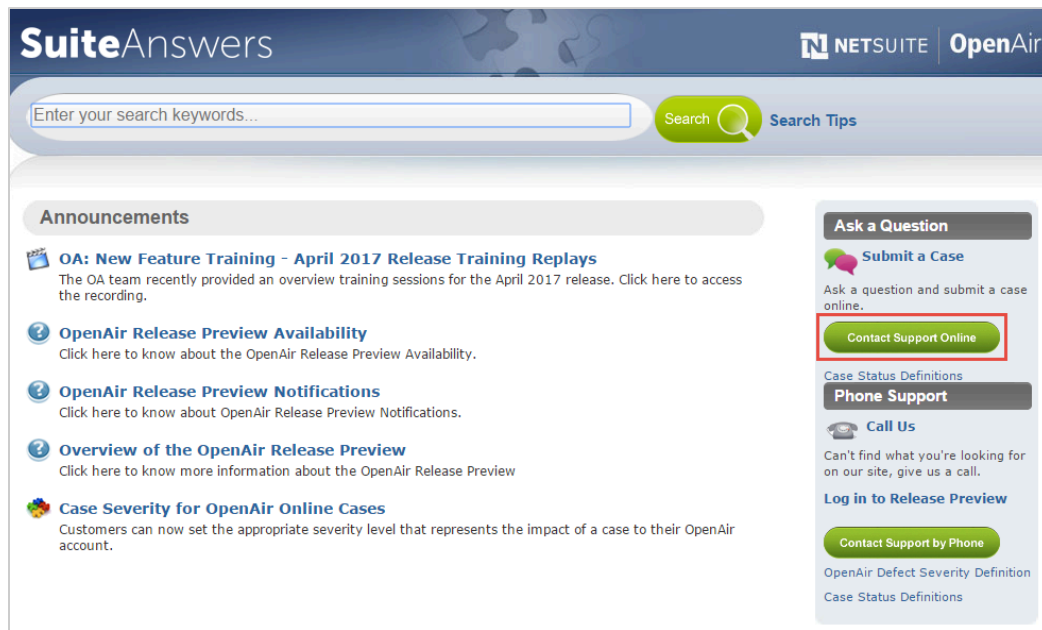
## Requesting a New Feature by Creating a Support Case

To request features which require OpenAir Customer Support to change internal account settings, such as many features within the  [Optional Features](#), you must create an OpenAir Customer Support Case in SuiteAnswers.

### To request a new feature by creating a Support Case:

1. Sign in to your OpenAir account.
2. Click **Support** in the User Center.
3. Click **Go to SuiteAnswers**.
4. In the "Ask a Question" sidebar under "Submit a Case", click **Contact Support Online**.





5. On the “Enter keywords related to your question” screen, type the name of the feature you want to enable in the search field, and click **Search**.
6. Click **Continue to Create Case...** above the search results.
7. On the “Create Case” form, enter the following information in the available fields:
  - In the “What would you like to do” dropdown list, select “Ask a question” or “Enable/disable switch”.
  - In the “Case Severity” dropdown list, select “C3 — How To / Non Urgent questions”.
  - In the “Subject” field, type “Internal Switch — [name of feature you want to enable]”.
  - In the “Details” field, type the feature you want enabled, which accounts you want it enabled for (for example, Production or Sandbox accounts), and which Company IDs to use if you have multiple Sandbox accounts.
  - In the “Product Area” dropdown list, select “OpenAir Web Application”.
  - In the “Feature” dropdown list, select “Switch Activation/Deactivation Requests”.
  - Do not enter anything into the “Attach Document” field.
  - In the “Email” field, type your email.

**Note:** Requests to enable or disable account-wide features in OpenAir can only be processed when an administrator’s email address is entered in this field.

- In the “Phone (Optional)” field, type a phone number where you can be contacted if you would prefer OpenAir Customer Support contacts you by telephone. Please include your country code and enter the number without any spaces.

## Create Case

What would you like to do? \* Enable/Disable Switch ▼

Case Severity \* C3 - How To / Non Urgent questions ▼

You can expand this section to review the description of each Case Severity.If you need to change the Case Severity, please provide specific details regarding the nature of the severity. +

Subject \* Internal Switch - Query Builder

Details \* I would like to enable the Query Builder feature on our company's Production account, Company ID Honeycomb123.

Product Area \* OpenAir Web Application ▼

Feature \* Switch Activation/Deactivation Reques ▼

Attach Document  Browse

Email \* mcollins@honeycomb.com

Phone (Optional)

\* = Required field

Cancel Submit

8. Click **Submit**.

When you have submitted the case, OpenAir Customer Support will contact you to confirm they have received the case, and will request additional information if necessary or guide you through any additional steps, such as setting up roles for the feature.

# Global

The following optional Global features are available in OpenAir. Some features require OpenAir Customer Support to enable them for you.

- [Accounting Period Functionality](#)
- [All Item Types in Calendar](#)
- [Allocation Grid Custom Field](#)
- [Allow the Owner/Requester/Administrator to Upload Attachments for Approved Objects](#)
- [Assign Project Job Codes for Users on a Per Project Basis](#)
- ["Assigned to" Column Filter in Tasks List View](#)
- [Attachment File Drag and Drop](#)
- [Attachment Viewer and Attachment Thumbnail](#)
- [Automatic Backup Service](#)
- [Conditional Dropdown Custom Fields](#)
- [Custom Email Notifications](#)
- [Display Contacts in "Last Name, First Name" Format in Drop-down Menus](#)
- [Display Incomplete Tasks on Dashboard](#)
- [Display the Booking's Requester Name in "Last Name, First Name Middle Name" Format in Reports](#)
- [Edit Exchange Cross Rates](#)
- [Enable Integration with NetSuite](#)
- [Enforce Column Filter Value Search](#)
- [Extended Character Set Support for List View Sorting and Filtering](#)
- [Feature-Specific User Satisfaction Feedback Form](#)
- [Hide Divider Sections on Forms](#)
- [Increase the Maximum Count of NetSuite Integration Schedule Runs Per Day](#)
- [Inline-Editing in List Views](#)
- [Multicurrency](#)
- [Multiple Schedule Exceptions Per Day by Time Off Requests](#)
- [New Selector for Customizing List Views](#)
- [Business Intelligence Connector](#)
- [Overlapping Timesheets and Envelopes at the Role Level](#)
- [Pick List Custom Field](#)
- [Product Updates Panel](#)
- [Proxy Approver Notifications](#)
- [Publish Shared Reports using BI Connector](#)
- [Query Builder](#)
- [Quick Audit Trail for Custom Fields](#)
- [Quick Audit Trail for Global Settings](#)
- [Redesigned Administration Module](#)

- Redesigned Advanced Filters
- Replace Non-Alphanumeric Characters with Underscores in Column Titles and Metadata
- Restrict Specific Custom Fields from Being Copied
- Save and Load List View Configuration
- Single Sign-On Integration Leveraging SAML
- Replace Non-Alphanumeric Characters with Underscores in Column Titles and Metadata
- Stop Slow Lists
- Stop Slow Reports
- Suppress Email Notifications or Add Addresses to Notifications
- Unexport Records from a Specific Application by UI
- Use Days Instead of Hours for All Time Entries
- User-Defined Reporting Currencies
- Wrap Text in List View Cells

## Accounting Period Functionality

By enabling this feature, separate accounting dates can be associated with most transactions, with reports drawing from these accounting dates. The ability to maintain separate accounting dates can be particularly useful when the original transaction date of an entity must be independent from the date, as signified by a financial report or general ledger application.

For example, the charges on an invoice dated July 5th may need to be associated with the month of June in the general ledger, as the charges were incurred in this month. The invoice transaction date would be 07/05/09, however, the invoice accounting date might be 06/01/09.

In another example, a receipt incurred in March may need to be posted to the financial system in June. In this example, the receipt transaction date might be 03/17/09, while the receipt's accounting date might be 06/01/09. The new accounting period functionality lets users to associate an additional independent accounting date with a transaction. Reports can then be configured to leverage the accounting dates, rather than the original transaction dates.

To enable this feature, contact OpenAir Customer Support.

Global Settings - Organization				
Account	Custom Fields	Customers	Display	Jobs, Rates
Organization				
Reports				
Users				
Accounting Periods				
Accounting period name	Start date	End date	Active	Default accounting period
- All -	- All -	- All -	- All -	- All -
2011:01	15-Aug-01	15-Aug-31	✓	
2011:02	15-Sep-01	15-Sep-28	✓	
2011:03	15-Sep-29	15-Oct-29	✓	
2011:04	15-Oct-30	15-Nov-28	✓	
2011:05	15-Nov-29	15-Dec-29	✓	✓
2011:06	15-Dec-30	16-Jan-28		

## All Item Types in Calendar

By default, the type of items a user can see in the OpenAir calendar depends on which modules this user can access. The following table lists the types of calendar items, and the application access required to view each item type

Item type	Access required
Bookings	Resources module
Time off requests	Timesheets module
Task assignments	Projects module
Work schedule	Account module

With this feature, employees can see their task assignments and bookings in the calendar even if they do not have access to the Resources and Projects modules. This lets you control access to modules that are not needed while enabling employees to see their full schedule in the calendar.



**Note:** Module access determines which type of user license is taken up by the employee. An employee with any combination of Account, Timesheets and Expenses application access takes up a Timesheets and Expenses (T&E) only license. An employee with any other application access takes up a Full user license. For more information, see the help topic [Licenses](#).

For more information about controlling employee module access, see the help topic [Access Control Overview](#).

To enable this feature, contact OpenAir Customer Support.

## Allocation Grid Custom Field

With this feature enabled, you can create allocation grid custom fields.

To enable this feature, contact OpenAir Customer Support.

Time Allocated to Each Client	%
Altima Technologies	030
Honeycomb Services	030
Cooper Software	040
<i>Total:</i>	<i>100</i>

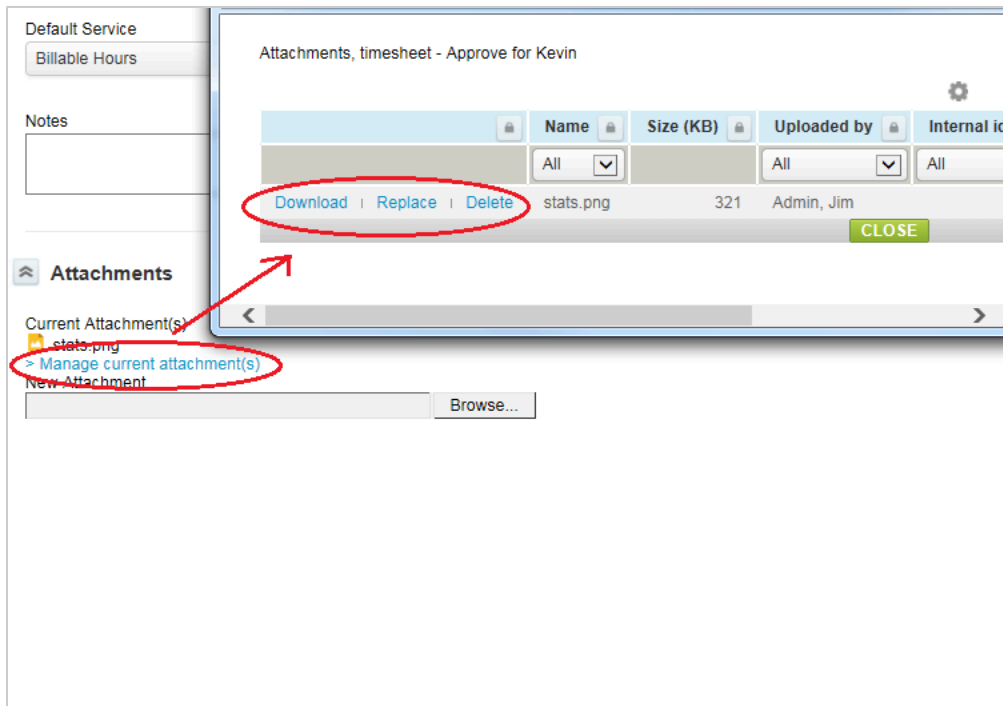
## Allow the Owner/Requester/Administrator to Upload Attachments for Approved Objects

This feature permits an owner/requester/administrator to manage the attachments for an approved object. Eligible objects include

- Authorizations
- Bookings
- Booking requests
- Deal booking requests
- Envelopes
- Invoices
- Proposals
- Purchase orders
- Purchase requests
- Schedule requests
- Receipts
- Timesheets

With this switch on, approved items can be downloaded, replaced, and deleted for the selected objects.

To enable this feature, contact OpenAir Customer Support.



## Assign Project Job Codes for Users on a Per Project Basis

This feature enhances the job code functionality to allow managers to assign different job codes to users based on the specific job function being performed on particular projects. These project job codes can be assigned per user in multiple areas of the application by configuring job code rules. These areas include bookings, time entry, project level assignment, and task assignment. The appropriate project job code will be assigned when time entries are saved.

**Time entry rules**

**Available**

- Booking
- Employee
- Project assignment
- Time entry
- Task assignment

**Selected**

- Employee

Add selected >    < Remove selected  
 Add all >        < Remove all

Save

After project job code rules have been configured, they can be linked to specific rate cards. Time billing rules can be configured to derive rates from rate cards. Thus, billing will occur based on the appropriate rate, as determined by the role an individual fulfilled for the project. Revenue recognition transactions generated from the As Billed revenue recognition rule will contain the appropriate job code assigned stemming from the hourly charges created by Billing Rules. The billing and recognition transactions list view can be customized to include the associated project job code. For forecasting purposes, charge and revenue projections will use the assigned project job codes when using time entries, and calculate project job codes (through job code rules) when forecasting using billings or project/task level assignments.

In addition, invoice layouts can be modified to include "Project job code" as an invoice column and invoice grouping. To modify an invoice layout, users with the appropriate roles privileges, go to Administration > Application Settings > Invoices > [select an invoice layout].

To enable this feature, contact OpenAir Customer Support.

## "Assigned to" Column Filter in Tasks List View

Use the column filter for the **Assigned to** column in the Project > Tasks list view to list only those tasks that are assigned to a specific resource.

The **Assigned to** column filter is always visible. By default, it does not let you select a specific resource — only the -All- metavalue is available in the column filter dropdown options. With this feature enabled, you can select a specific resource to list only those tasks that are assigned to the selected resource.

**Note:** When you click **<number> incomplete tasks** in the Home > Home (My Status widget), the tasks list view appears and lists only those tasks that are assigned to you. The **Assigned to** column filter shows your name (the name of the authenticated user) even when this feature is not enabled. Clear column filters or select the -All- metavalue to revert back to listing all tasks in the tasks list view and not only those tasks that are assigned to you.

To enable this feature, contact OpenAir Customer Support.

**Assigned to**


Pimm, Joe

Pimm, Joe	320 hrs
Thompson, Jane	320 hrs
Pimm, Joe	16 hrs
Analyst	16 hrs

## Attachment File Drag and Drop







This feature lets you add attachments to projects, expense reports and receipts using file drag and drop. After you enable this feature, a new user interface for attachments appears on the project, expense report, and receipt properties forms. Like with the default attachment user interface, you can either attach multiple files from your computer or attach a single workspace document.

To add one or multiple files from your computer as attachments, drag the files to the **file attachments** box. The attached files appear in the **file attachments** box and include information about the file (file name, size, date and time uploaded, uploaded by).

 **Note:** The date and time uploaded follows the preferred date format and time zone in your personal settings.

You can also drag a folder from your computer to attach all the files contained in the folder.

After the files are attached the following options are available:

- The number of attachments  is indicated in the top right corner of the **file attachments** box.
- To download a single attachment, click the download icon .
- To download all attachments as a Zip archive, click the download icon in the top right corner of the **file attachments** box .
- To manage the current attachments, click the edit icon .
- To delete an attachment, click the delete icon .
- To delete all attachments, click the delete icon  in the top right corner of the **file attachments** box.



**Note:** When you create a new project, expense report, or receipt, you can add attachments before you save the form. If you leave the form without saving the changes, the attachments will be saved in OpenAir as unassigned attachments. For more information, see [Unassigned Attachments](#).


If you add attachments using file drag and drop to an existing project, expense report, or receipt, the attachments will be associated with the project, expense report, or receipt even if you do not save the form.

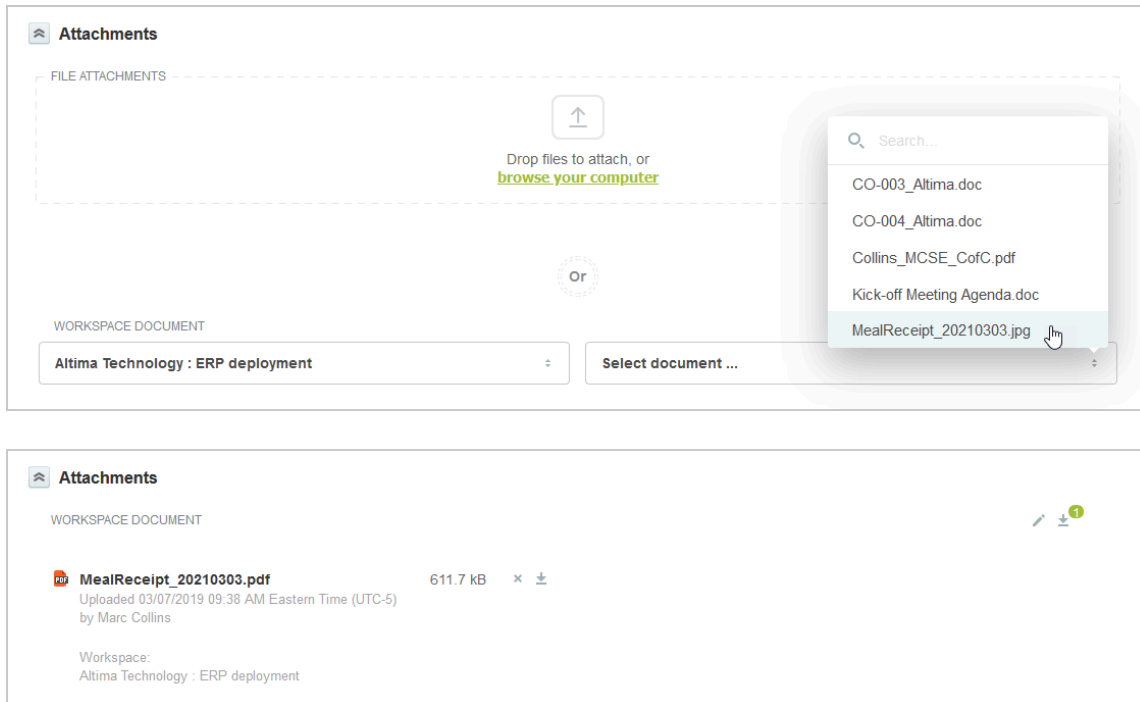
The form shows a maximum of 100 attachments for receipts and 1,000 for expense reports.

The Attachment Viewer and Attachment Thumbnail optional feature extends the functionality of the Attachment File Drag and Drop feature. See [Attachment Viewer](#) and [Attachment Thumbnail](#).

The screenshot shows the 'Attachments' section of a form. At the top, there's a dashed green box labeled 'FILE ATTACHMENTS' with a green border. Inside this box, there's a green square with an upward arrow and the text 'Drop files to attach, or [browse your computer](#)'. To the right of this is a small icon of a folder with a document and a '+ Copy' button. Below the dashed box is a circular icon with the word 'OR' inside. Below that is a section labeled 'WORKSPACE DOCUMENT' with a dropdown menu showing 'Select workspace ...' and a button 'No document(s) available'.





The screenshot shows the 'Attachments' section of a form with a list of uploaded files. The list is titled 'FILE ATTACHMENTS' and has a green border. It contains four items, each with a file icon, name, size, upload date, and user. The items are: 'February\_2\_2021.png' (49.2 kB, uploaded 02/12/2021 06:53 AM Eastern Time (UTC-5) by Marc Collins), 'February\_3\_2021.png' (114.7 kB, uploaded 02/12/2021 06:53 AM Eastern Time (UTC-5) by Marc Collins), 'February\_4\_2021.jpg' (420.5 kB, uploaded 02/12/2021 06:53 AM Eastern Time (UTC-5) by Marc Collins), and 'February\_5\_2021.png' (79.7 kB, uploaded 02/12/2021 06:53 AM Eastern Time (UTC-5) by Marc Collins). Each item has a trash icon and a download icon. There are also icons for editing, deleting, and adding more attachments at the top right of the list.

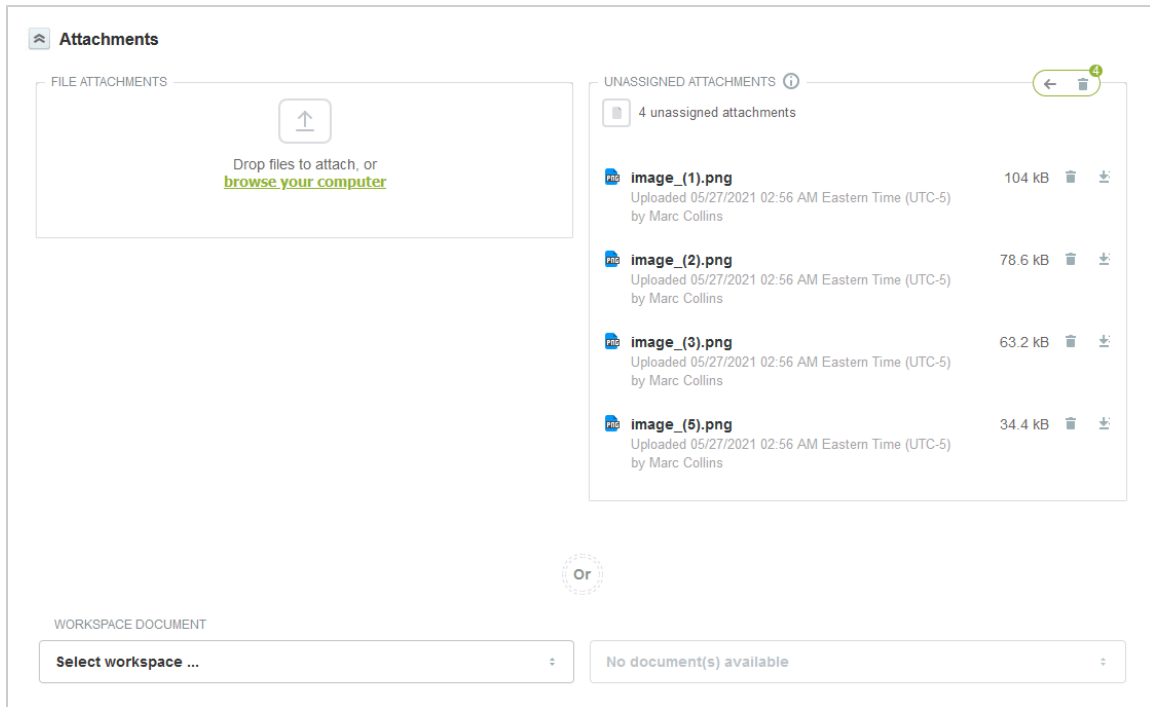
To attach a workspace document, select the workspace then select the document. To clear the selected workspace document, click on the clear icon .



## Unassigned Attachments

When you create a new project, expense report, or receipt, you can add attachments before you save the form. If you navigate away from the form without saving the changes, the attachments will be saved in OpenAir as unassigned attachments. The next time you open any of your projects, expense reports or receipts, the form will include an **unassigned attachments** box listing all the attachments that you uploaded and that are not associated with a project, expense report, or receipt.

- The number of unassigned attachments **4** is indicated in the top right corner of the **unassigned attachments** box.
- To associate unassigned attachments to the current project, expense report, or receipt, drag the files from the **unassigned attachments** box to the **file attachment** box.
- To associate all unassigned attachments to the current project, expense report, or receipt, click the arrow icon  in the top right corner of the **unassigned attachments** box.
- To delete an unassigned attachment, click the delete icon .
- To delete all unassigned attachments, click the delete icon  in the top right corner of the **unassigned attachments** box.
- To download an unassigned attachment, click the download icon .



## Viewing and Deleting All Unassigned Attachments Uploaded to the Account

Account administrators can manage unassigned attachments added by all users on the account.

To manage the unassigned attachments, go to Workspace > OpenAir — Unassigned Attachments > Documents. The OpenAir — Unassigned Attachments workspace is created automatically when the first unassigned attachment is added to your account. Only account administrators can view this workspace.

### To delete all unassigned attachments

1. Sign in to OpenAir as an account administrator.
2. Go to Workspace > OpenAir — Unassigned Attachments.
3. Click **Download all documents**. A dialog appears.
4. Check the **Delete all documents** box.
5. Click **Download**. A page appears confirming that all documents in the workspace were deleted. The page also includes a link to a ZIP archive to download all deleted documents.



**Tip:** To save storage space, delete documents from the OpenAir — Unassigned Attachments workspace regularly.



**Important:** Attachments to an unsaved new project, expense report, or receipt are initially added in to the "OpenAir — Unassigned Attachments" workspace until the user saves the entity form. When deleting all documents in the workspace, you may delete attachments for projects, expense reports and receipts that users are currently working on. Make sure you time unassigned attachment deletion accordingly.

To enable the Attachment File Drag and Drop feature, contact OpenAir Customer Support.

## Attachment Viewer and Attachment Thumbnail

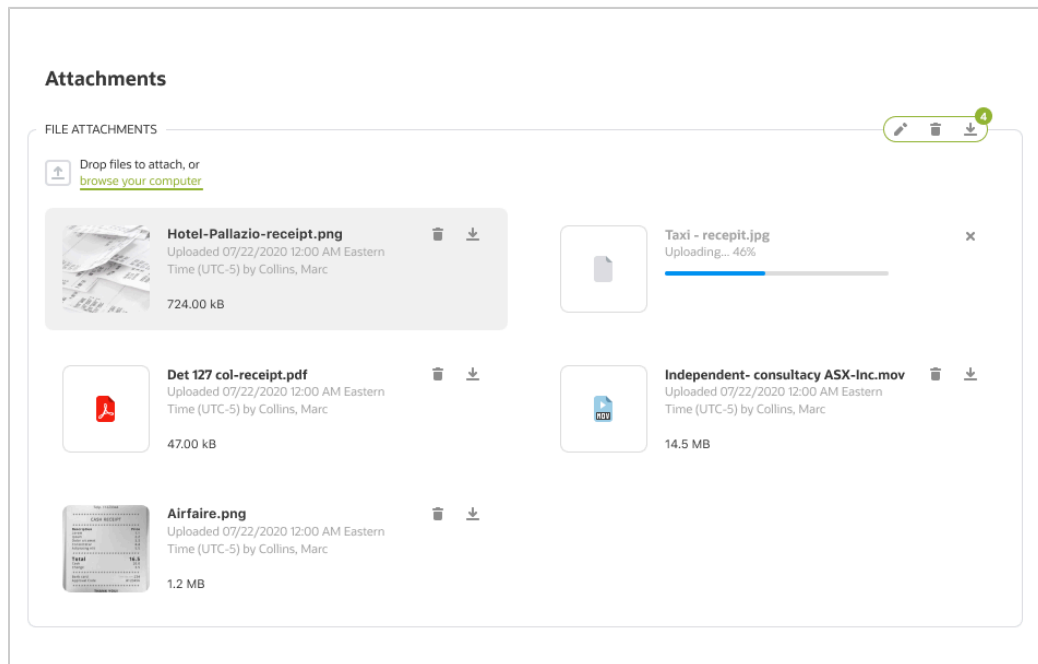
View thumbnails for BMP, GIF, JPG, PDF, PNG, and TIFF files, and preview BMP, GIF, JPG, PDF, and PNG attachment files directly from the project, expense report or receipt properties form, and from the expense report or receipt list views.

After you enable the Attachment Viewer and Attachment Thumbnail optional feature for your account:

- OpenAir generates a thumbnail image automatically when you add a new attachment or workspace document and if the file type is supported. The thumbnail is generated whether you add the attachment file or workspace document using the OpenAir UI, REST API, SOAP API or XML API. See [Attachment Thumbnail Autogeneration](#).


**Note:** Review the current limitations:


- Thumbnail images are generated for all supported attachment files you add throughout OpenAir.
  - Thumbnail images are not available for attachment and workspace document files added before the Attachment Viewer and Attachment Thumbnail feature was enabled for your account.
- If the Attachment File Drag and Drop optional feature is enabled for your account, OpenAir shows the thumbnail images in the attachments drag and drop section on the project, expense report, and receipt properties forms.




















- You can add the Thumbnail column to the following list views.
  - Expenses > Expense Reports
  - Expenses > Expense Reports > [Select an expense report] > Receipts
  - Expenses > Receipts

The column shows a thumbnail for each attachment when the thumbnail exists, or a file type icon otherwise.

If there are more attachment thumbnails than can be shown in the column, the column shows a **+<n>** icon , where <n> is the number of additional attachment files for which thumbnails are not shown. The column shows as many thumbnails as can fit in within the width of the column up to 10 attachment thumbnails.

If there are no attachments for the expense report or receipt, the column shows a no attachment icon .



<div> Open Submitted To Approve Approved Rejected Reimbursed <b>All</b> </div> <div> BULK ACTIONS    Untitled*     </div>									
	Name	Tracking #	Thumbnail	Status	Date	User	Total (money)	Internal id	
	- All -			- All -	- All -	- All -		- All -	
<input type="checkbox"/>	01.12.2022 to 31.12.2022	654898		Open	01.12.2022	Adams_Mary	0.00 USD		
<input type="checkbox"/>	01.12.2022 to 31.12.2022	654894	 +2	Open	01.12.2022	Admin_Jim	0 JPY		
<input type="checkbox"/>	01.11.2022 to 30.11.2022	654893		Open	01.11.2022	Admin_Jim	0 JPY		
<input type="checkbox"/>	01.09.2022 to 30.09.2022	654892		Open	01.09.2022	Admin_Jim	0 JPY		
<input type="checkbox"/>	01.08.2022 to 31.08.2022	654891		Open	01.08.2022	Admin_Jim	200.00 USD		
<input type="checkbox"/>	Rejected receipts from 01-Jan-22 to 31-Jan-22	654890		Open	13.05.2022	Adams_Mary	500.11 USD		
<input type="checkbox"/>	01.07.2022 to 31.07.2022	654888		Open	01.07.2022	Admin_Jim	200.00 USD		
<input type="checkbox"/>	01.06.2022 to 30.06.2022	654887		Open	01.06.2022	Admin_Jim	200.00 USD		
<input type="checkbox"/>	01.05.2022 to 31.05.2022	654886		Open	01.05.2022	Admin_Jim	0.72 USD		
<input type="checkbox"/>	01.04.2022 to 30.04.2022	654885		Open	01.04.2022	Admin_Jim	0.00 USD		

- You can click a thumbnail to preview a BMP, GIF, JPG, PDF, or PNG attachment file directly from the project, expense report, or receipt properties form, and from the expense report or receipt list views. The attachment viewer shows:

- The file name and corresponding file type icon in the top bar.
- The attachment file preview.

Click the arrows on the left or right of the preview pane to view the previous or next attachment.

- A toolbar with the following actions:



- Click the download icon  to download the attachment.
- Click the window icon  to open the attachment in a new tab or window.

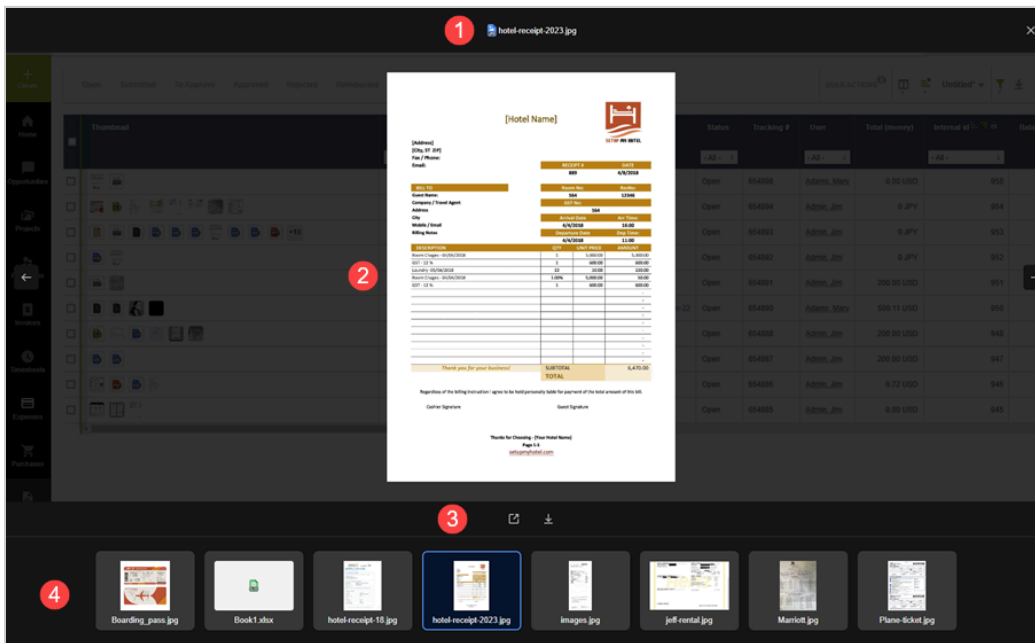


**Note:** You can also use action keys on your keyboard:

- ESC – Close the attachment viewer.
- Left arrow – View the previous attachment.
- Right arrow – View the next attachment.

- A navigation bar showing thumbnails for all attachments to the expense report or receipt. Click a thumbnail to view the attachment in the preview pane.

The navigation bar and preview pane show a file type icon for most unsupported file types, a generic file icon  for other unsupported and unknown file types, no attachment icon  if there is an error with the attachment, such as a corrupted file, for example.



- Note:** The attachment viewer uses the native browser PDF viewer to show a preview of PDF documents.
- Most browsers let you view PDF documents in a browser tab using a native PDF viewer by default. You or your organization may disable the PDF viewing capabilities in the browser settings. When the native browser PDF viewer is disabled, the attachment viewer does not show a preview of the PDF document. Instead, it starts downloading the file automatically or lets you click **Open** to download the file to your device.
  - If you interact with the PDF viewer, you can no longer use the action keys to interact with the attachment viewer.
  - If the PDF viewer cannot read the document, the attachment viewer shows a reload button or nothing, depending on your browser.

To enable this feature, contact OpenAir Customer Support.

## Attachment Thumbnail Autogeneration

When the Attachment Viewer and Attachment Thumbnail optional feature is enabled, OpenAir generates a thumbnail image automatically when you add a new attachment or workspace document and if the file type is supported. The thumbnail is generated whether you add the attachment file or workspace document using the OpenAir UI, REST API, SOAP API or XML API.

- The thumbnail image is generated immediately (in a few seconds or longer, depending on the OpenAir system load).
- The thumbnail image is generated again when using you replace the attachment file or add a new revision of the workspace document.
- The thumbnail image is generated when using the copy/move document functionality for workspaces.
- The thumbnail image file for each attachment is stored in the same folder as the attachment file.
- The thumbnail image is deleted when the attachment is deleted, including when the attachment is deleted because the record it is associated with is deleted. The thumbnail image is restored when the attachment is restored.
- Thumbnail image files do not count toward your account storage limit.
- The smaller side of the thumbnail image is always 80px, the other side maintains the aspect ratio of the attachment file.
- Supported attachment formats and corresponding thumbnail image format.

Attachment file	Thumbnail image	Attachment Viewer
BMP	PNG	✓
GIF	GIF (Static)	✓
JPEG, JPE, JPG	PNG	✓
PDF	PNG (The first page of the PDF document is used to generate the thumbnail)	✓ The native browser PDF viewer must be enabled.
PNG	PNG	✓
TIF, TIFF	PNG (Multilayered TIFF images are flattened to generate a thumbnail image including all visible layers)	—

**Note:** In the case of attachments added using the SOAP API or XML API, the attachment file is provided as base64-encoded data using the base64\_data attribute.

## Automatic Backup Service

The OpenAir Automatic Backup Service (ABS) lets you set up a regular delivery of your OpenAir account data to an email address or SCP/SFTP server for safeguarding. Your data is compressed as a ZIP file and can be PGP encrypted for additional security. You can use this feature to download all of your OpenAir data and attachments.

**Note:** The Automatic Backup Service is a licensed add-on and must be purchased separately. To enable the Automatic Backup Service feature, contact your OpenAir account manager or OpenAir Professional Services.

For more information about the feature and its configuration options, see [Administrator Guide](#).

## Conditional Dropdown Custom Fields

OpenAir's custom field functionality lets you create user-defined fields specific to your company's needs. Custom fields with different associations can be created for fields that are not available in the application

as a standard built-in field. Currently, custom fields on a form are independent of one another with no relational dependencies between two or more fields. With dropdown custom fields, you are able to select a value from a pre-defined list of options.

OpenAir has the ability for you to create value selection dependencies between two dropdown custom fields. The value selected in the first custom field will be able to limit the values displayed within the second custom field. After dependencies have been configured, the second custom field will dynamically appear on the form with the appropriate value choices. A single custom field can have dependencies with multiple custom fields. In addition to creating conditional dependencies between two custom fields, a value list editor is available. Leveraging drag-and-drop functionality, you can move the position of values within a single list.

After you enable or disable this optional feature, go to Administration > Global Settings > Account > Maintenance Settings, choose **Regenerate the custom field value list table**, and click **OK**.

To enable this feature, contact OpenAir Customer Support.

**Continent:**

- Africa
- Asia
  - China
  - India
  - Japan
- Australia
- Europe
  - Germany
  - France
- North America
  - Canada
  - The United States
  - Mexico
  - Guatemala
  - Cuba
- South America
  - Brazil
- +

**Country:**

- Haiti
- Dominican Republic
- Honduras
- Nicaragua
- El Salvador
- Costa Rica
- Panama
- Jamaica
- Indonesia
- Pakistan
- Nigeria
- Bangladesh
- Russia
- Philippines
- Ethiopia
- Vietnam
- Egypt
- Iran

Drag elements from one field to the other to create dependencies

In this example, when an employee selects "Europe" as their Continent, they can only select Countries listed under "Europe" in the "Country" drop down list.

Status  
Employee

Continent  
Europe

Country  
Germany  
France

## Custom Email Notifications

Within the OpenAir application, there are many events that can occur where it may be beneficial to send an email notification to a user. For example, when a user is assigned to a task within a project, the



project manager may choose to notify the user of this assignment. Or, if a booking has been created for a resource on a project, the booked user may be notified of the booking. In some cases, it may be beneficial to send a notification based on specific criteria. It may also be helpful to send the notification to select users as well as customize the body of the email to include additional information about the event.

This feature extends existing email notifications functionality. Within each application setting, there is a new Notifications area where the criteria, recipients, and email body can be configured. For example, a notification may be configured such that a new booking notification will only be sent to the booked user if the booking type is set to **Requested**. In addition to configuring the criteria, users can be selected as recipients of the email. The email body can be customized to include additional text as well. Multiple notifications may be configured.

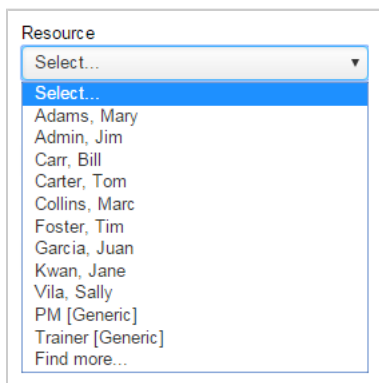
**Note:** email notifications are available in Application Settings for Expenses, Invoices, Projects, Resources and Timesheets. The notifications can be triggered by specific events — for example on booking creation, modification, deletion, approval, submission, rejection and approval request for the Resources application.

To enable this feature, contact OpenAir Customer Support.

## Display Contacts in “Last Name, First Name” Format in Drop-down Menus

This feature changes the contact display format to “Last name, First name” in dropdown menus, instead of using the default “First name Last name” format.

To enable this feature, contact OpenAir Customer Support.



## Display Incomplete Tasks on Dashboard

This feature is enabled by default. OpenAir displays the number of open or incomplete tasks in the My Status and Company Status portlets on the Home screen.

Depending on your configuration and use of OpenAir, you may not need the My Status and Company Status portlets to show the number of incomplete tasks. For example, if you are using tasks mainly to manage access to timesheets and expenses, you may accumulate a high number of open or incomplete

tasks over time. Showing a high number of incomplete tasks in the My Status and Company Status portlets impacts the performance of the Home screen. Excluding this information should improve Home screen loading time.

To disable this feature and remove the number of incomplete tasks from the Home screen, contact OpenAir Customer Support.

## Display the Booking's Requester Name in “Last Name, First Name Middle Name” Format in Reports

This feature displays the booking's requester name as “Last Name, First Name Middle Name” format in reports.

To enable this feature, contact OpenAir Customer Support.

Resource 	Requester 	Client 
<u>Pimm, Joe</u>	<u>Collins, Marc</u>	Webb Inc.
<u>Carter, Tom</u>	<u>Collins, Marc</u>	Webb Inc.
<u>Carter, Tom</u>	<u>Collins, Marc</u>	Webb Inc.
<u>Kelly, Joan</u>	<u>Kelly, Joan</u>	Luxis Software
<u>Kelly, Joan</u>	<u>Kelly, Joan</u>	Luxis Software
<u>Kelly, Joan</u>	<u>Kelly, Joan</u>	Luxis Software
<u>Davis, Judy</u>	<u>Collins, Marc</u>	Webb Inc.
<u>Davis, Judy</u>	<u>Collins, Marc</u>	Webb Inc.
<u>Davis, Judy</u>	<u>Collins, Marc</u>	Webb Inc.
<u>Davis, Judy</u>	<u>Collins, Marc</u>	Webb Inc.

## Edit Exchange Cross Rates

Enable this feature to let account administrators edit the cross rate table.

When enabled, the cross exchange rates (forex table) can be modified. If you have entered a currency override rate in the “Set Exchange rates” form, this will take care of the FUTURE rate. If date ranges outside the current dates are entered the forex table will automatically be extended to cover those ranges. The extensions will be done using the current PAST or FUTURE rates dependant on the direction of the extension.

To edit exchange cross rates, go to Administration > Global settings > Organization > Currencies > View exchange rates, click the Tips button then click **Modify the exchange cross rate table**.

To enable this feature, contact OpenAir Customer Support.

Currencies

Set exchange rates **View exchange rates** Multi-currency

Cancel **Save**

FUTURE	FUTURE	GBP/USD	CAD/USD	AUD/USD	EUR/USD
		0.61846	0.97569	0.99218	0.71487
		0.71	1.37	1.38	.91

FUTURE is the exchange rate used for dates after 05/19/14. Please read the note on the nightly update in the page hints.

PAST	PAST				
		0.94753	1.00800	0.99552	0.78239

PAST is the exchange rate used for dates prior to 03/01/14. The current PAST rate is displayed below the data entry field.


Enter a date range and the rate versus the USD for any currency you want to modify.


[Add rows] ▼

## Enable Integration with NetSuite

This feature enables an account to be integrated with NetSuite. When enabled, you will see the option "Integration : NetSuite" on the Administration > Global Settings page. Click to access the NetSuite Integration form.

See the  [NetSuite Integration](#) for details.

 **Tip:** Using this feature adds many settings to the Tips button under the NetSuite Integration Administrator option.

Users

- Employee locations
- Employees
- Filter set
- Guest roles
- Guests
- Roles

Account

- Automatic backup service
- FilterSet settings
- Integration: Add-on services
- Integration: Import/Export
- Integration: NetSuite**
- Invoice email settings

**Global Settings** **NetSuite**

**NetSuite integration**

Use OA2 User Interface for this session

**NetSuite integration admin**

NetSuite OpenAir-NetSuite Integration Guide

Retrieve all roles available to the user specified in the Email field

**Automate**

**Send data to NetSuite**

**Advanced Settings**

**Automate**

**SAVE**

As of October 17, 2015, a new, more user-friendly NetSuite integration UI is also available.

**Important:** Enabling this switch will invalidate all of your existing mappings. After enabling the switch, you will need to re-setup all of the mappings again. We strongly seeking assistance from PS when requesting this UI. We also advise first re-checking your existing mappings before setting up the new mappings.

The screenshot shows the 'Netsuite integration' interface with the 'Mapping' tab selected. On the left, there are tabs for 'Employees (Employees)' and 'Clients (Customers)'. The main area displays a table of mappings for 'Employees (Employees)'. The table has columns: 'Active', 'Netsuite field', 'Direction', 'OpenAir field', and 'Initial only'. The 'Employees (Employees)' switch is turned 'ON'. The table contains the following mappings:

Active	Netsuite field	Direction	OpenAir field	Initial only
<input checked="" type="checkbox"/>	Employee.internalId	→	User.netsuite_user_id__c	<input type="checkbox"/>
<input checked="" type="checkbox"/>	= "1"	→	User.active	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Employee.entityId	→	User.nickname	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Employee.email	→	User.email	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Employee.lastName	→	User.last	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Employee.firstName	→	User.first	<input type="checkbox"/>
<input checked="" type="checkbox"/>	= "NetSuite account currency"	→	User.currency	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Employee.address	→	User.address1	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Employee.address	→	User.active	<input type="checkbox"/>

At the bottom of the table, there is an 'Add row' button.

To enable this feature, contact OpenAir Customer Support.

## Enforce Column Filter Value Search

Column filters with a high number of distinct values have an impact on list view performance and usability. A solution is to stop distinct values being loaded when users open the column filter, to enforce a search for matching column filter options and to limit the number of matching values returned to 1000. This solution can be applied to selected column filters on request. It can be particularly useful for project or resource name columns, for example.

**Note:** This feature is built in for the Tasks column filter. To show the list of options in the Tasks column filter, type at least 3 characters in the search box and press Enter.. It is optional for all other column filters.


### To stop distinct value dropdown options being loaded for selected column filters:

1. Identify and list the column filters with high number of distinct value dropdown options.
2. Contact OpenAir Customer Support and ask for the **Enforce column filter value search** feature to be enabled for the column filters identified in step 1.

**Note:** This setting will apply to the specified column filters across all list views on your account.

This performance optimization feature modifies the user interaction for the specified column filters:

1. When clicking the column filter dropdown, a message appears instead of the usual dropdown options.
2. To show the list of options, type at least 3 characters in the search box and press Enter. OpenAir returns a list of up to 1000 values containing your search string.
3. If there are more than 1000 matching values in the database, only the first 1000 values are returned as search results and a message appears above the search results. Refine your search until there are less than 1000 matching values.
4. To filter the list of values returned by your last search, type any number of characters in the search box BUT do not press Enter. The list of values is filtered as you type with matching strings highlighted in bold.

 **Note:** Filtering as you type only takes into account the values returned by your last search. If your initial search matched more than 1000 values in the database, only the first 1000 values were returned and are available for filtering. Other matching values may exist in the database but are excluded as there were not returned in the last search. You should refine your search until there are less than 1000 matching values (step 3) before filtering the search results.

5. Select the desired options to set the column filter.


## Extended Character Set Support for List View Sorting and Filtering

This optional feature corrects sorting and filtering issues that may occur in list views when using characters that are not in the basic Latin alphabet set of characters.

By default, OpenAir supports the [ISO basic latin alphabet](#) (26 characters A-Z) for sorting and filtering in list views. This may not be suitable for localization and international usage, depending on the set of languages used for your OpenAir data. In particular, it is not suitable for languages that use:

- An extended Latin alphabet that includes additional characters using diacritics or ligatures. For example, the German alphabet includes one ligature (ß) and three diacritics (umlauts — Ä, Ö, and Ü).
- A non-Latin script.

Enable this feature to extend character support for sorting and filtering in list views to the [Basic Multilingual Plane](#) in the Unicode standard. This adds support for most commonly used language character sets.

 **Important:** This feature uses data conversion that may impact the performance of list views. List views may load more slowly after you enable this feature.

To enable this feature, contact OpenAir Customer Support.

**without** extended support

	Project	Client	Project owner
	All	Altima Technol	All
<input type="checkbox"/>	<a href="#">Wings</a>	Altima Technology	Adams, Mary
<input type="checkbox"/>	<a href="#">SRP deployment</a>	Altima Technology	Porter, Marie
<input type="checkbox"/>	<a href="#">SRP deployment</a>	Altima Technology	
<input type="checkbox"/>	<a href="#">Pegasus</a>	Altima Technology	Collins, Marc
<input type="checkbox"/>	<a href="#">Ostern (Easter)</a>	Altima Technology	Davis, Judy
<input type="checkbox"/>	<a href="#">First Slack Project</a>	Altima Technology	Collins, Marc
<input type="checkbox"/>	<a href="#">ERP integration</a>	Altima Technology	Porter, Marie
<input type="checkbox"/>	<a href="#">ERP deployment</a>	Altima Technology	
<input type="checkbox"/>	<a href="#">ERP deployment</a>	Altima Technology	Porter, Marie
<input type="checkbox"/>	<a href="#">CRM integration</a>	Altima Technology	Collins, Marc

**with** extended support

	Project	Client	Project o...
	All	Altima Technol	All
<input type="checkbox"/>	<a href="#">Wings</a>	Altima Technology	Adams, Mary
<input type="checkbox"/>	<a href="#">SRP deployment</a>	Altima Technology	Porter, Marie
<input type="checkbox"/>	<a href="#">SRP deployment</a>	Altima Technology	
<input type="checkbox"/>	<a href="#">Pegasus</a>	Altima Technology	Collins, Marc
<input type="checkbox"/>	<a href="#">Österreich (Austria)</a>	Altima Technology	Davis, Judy
<input type="checkbox"/>	<a href="#">Ostern (Easter)</a>	Altima Technology	Davis, Judy
<input type="checkbox"/>	<a href="#">First Slack Project</a>	Altima Technology	Collins, Marc
<input type="checkbox"/>	<a href="#">ERP integration</a>	Altima Technology	Porter, Marie
<input type="checkbox"/>	<a href="#">ERP deployment</a>	Altima Technology	
<input type="checkbox"/>	<a href="#">ERP deployment</a>	Altima Technology	Porter, Marie

	Project	Client	Project owner
	O	Altima Technol	All
<input type="checkbox"/>	<a href="#">Ostern (Easter)</a>	Altima Technology	Davis, Judy
<input type="checkbox"/>			

	Project	Client	Project owner
	O	Altima Technol	All
<input type="checkbox"/>	<a href="#">Österreich (Austria)</a>	Altima Technology	Davis, Judy
<input type="checkbox"/>	<a href="#">Ostern (Easter)</a>	Altima Technology	Davis, Judy

## Feature-Specific User Satisfaction Feedback Form

OpenAir uses an optional feedback form to gather feedback about specific features. It will help OpenAir gain understanding and improve the features usability and user experience in future.

The feedback form is currently enabled for the following features:

- Advanced resource search
- Consolidated resource profile
- Expenses module
- Outline, Gantt and task detail view
- Project center
- Receipt attachments UI
- Resource compare view

The feedback form appears after the user has interacted with the feature several times. For example, users will be asked for feedback after running several searches on the Advanced Resource Search, updated profiles several times using the Consolidated Resource Profile, or loading the Compare view several times.

Users can opt out of the survey either by selecting the **Don't show me this feedback form again** option on the feedback form or by selecting **Disable feature-specific survey form** in Personal settings. Users can opt in again later by changing the preference in Personal settings.

The feedback form consists of a simple satisfaction question, asking users to rate the feature on a scale.

Users can postpone answering by clicking **Show me later** or closing the popup window, and the feedback form will pop up again 30 days later.

How satisfied are you with  
**Advanced Resource Search?**

Five smiley face icons representing a satisfaction scale from 'Extremely satisfied' to 'Extremely dissatisfied'. A hand cursor is pointing at the 'Extremely satisfied' icon.

☐ Don't show me this feedback form again.  
You can change the preference later in Personal Settings.

**SHOW ME LATER** **SUBMIT**

If the response is either negative (Somewhat dissatisfied / Extremely dissatisfied) or neutral (Neither satisfied nor dissatisfied), users are prompted for additional optional feedback.

← I've changed my mind

**Tell us more, please.**  
Let us know, why are you not satisfied with the Advanced Resource Search.

**CLEAR** 51/1000

**SUBMIT**

After the user submits the form, a message displays to thank users for their feedback and the answers are stored. Users will not be prompted again for feedback on the same feature unless significant changes have been made to the feature and feedback is required to measure whether these changes have improved the feature for end users.

The feature-specific user satisfaction responses data can be downloaded using Administration > Global Settings > Account > Integration: Import/Export > Export All data in MySQL format or Administration > Global Settings > Account > Automatic Backup Service.

**Note:** The feature-specific user satisfaction survey can be disabled for your account. To disable this feature, contact OpenAir Customer Support.

## Hide Divider Sections on Forms

With each form that contains a link to **Modify the form permissions**, users have the option to hide entire sections. To hide sections, launch the form permissions from the Tips button, scroll down to **Hidden divider sections**, and select the box for the section to be hidden under the desired role. For example, in the Edit project form, select the box for the “Attachments” section under the User role and Attachments will no longer display on a user's Edit project form.

To enable this feature, contact OpenAir Customer Support.

**Hidden divider sections**

Check the box to make a section hidden for a role.

	Admin	Consultant	Project man...
Additional information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Support Settings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Email Settings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Optional Features	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Time Settings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Regional Settings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Print Settings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Page Layout	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dashboard Options	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Timesheet Options	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Increase the Maximum Count of NetSuite Integration Schedule Runs Per Day

With this feature, you can set the maximum allowed integration scheduled runs. The default is 10, and can be set to a maximum of 24 runs per day.

To enable this feature, contact OpenAir Customer Support.

**Netsuite integration** [Credentials](#) | [Automate](#) | [Mapping](#)

**Automatically run the integration**

Active ON ☐ ☐ ☐

Day Select...  at Select...

Times are in U.S. Eastern Time

ON ☐ ☐ ☐ Select...  at Select...

ON ☐ ☐ ☐ Select...  at Select...

ON ☐ ☐ ☐ Select...  at Select...

[+ Add schedule](#)



## Inline-Editing in List Views

Inline-editing in list views lets you edit records from within the list view. This feature is currently available for the following views only:

- Administration > Global Settings > Organization > Projects
- Projects > Projects

**Note:** Standard fields for projects supporting inline-editing include Project, Customer, Project owner, Project stage, Transactional budget (hours), Project location, Cost center, Active, Notes, Is a portfolio project, Start date, Invoice layout, Authorizations approver, Project budgets approver, PO approver, Purchase request approver, Bookings approver, Revenue containers approver, Timesheets approver, Invoice approver, Expense reports approver, Project approver 1, Project approver 2, and Project approver 3.

Custom field types supporting inline-editing include Checkbox, Date, Dropdown, Pick list, Text, and Text area.

- Projects > Tasks
- Projects > Projects > [Select a project] > Project Center
- Reports > Saved Reports

**Note:** Currently, the only field for reports supporting inline-editing is Name.

If the Inline-Editing feature is enabled and available for the list view you are working with, a label on top of the column headers indicates this is an editable list view.

- Double-click any editable cell to edit the field value straight from the list view, without having to leave the list view or open a record form.

**Note:** Inline-editing is available for all fields except Multiple Selection and File Attachment fields. Multiline text area fields are supported as of October 12, 2019.

- Press the Tab key or Shift+Tab to go to the editable cell immediately to the right or immediately to the left, respectively. If you are editing the last editable cell to the right, press the Tab key to go to the first editable cell in the same row. If you are editing the first editable cell to the left, press Shift + Tab to go to the last editable cell in the same row.
- Click a different row to save the changes made, or press the Enter key to save the change, close the edit mode and move to the cell immediately below. An on-screen message confirms the record was saved or notifies you in case of error in the same way as when you click **Save** on the Task form.
- Form permissions and form rules are respected. If you are not able to modify a particular record or field on the record form, you will not be able to modify that record or field in the list view.
- Any form scripts associated with the record form are triggered when editing a record directly from the list view.

The screenshot shows the OpenAir interface with a list view. At the top, there's a status bar with 'PENDING', 'COMPLETED', and 'ALL' tabs. A green notification box says 'Record was saved.' with a close button. Below this is a table with columns: ID, Number, Client, Project, Task, Start, Finish, and Hours. The Hours column is further divided into Planned, Gap, Booked, and Billed. A calendar pop-up is visible over the table, showing the month of March 2019. A red arrow points to the calendar pop-up.

ID	Number	Client	Project	Task	Start	Finish	Hours			
							Planned	Gap	Booked	Billed
316	23	Fernhill Solutions	Financial Integration	Integration go-live	2016-06-06	2016-06-06	0,00	0,00	0,00	0,0
254	24	United Software	Add-on services	Optimize	2016-04-12	2016-04-12	0,00	0,00	0,00	0,0
272	23	United Software	Add-on services	System cut over	2016-04-12	2016-04-12	0,00	0,00	0,00	0,0
273	25	United Software	Add-on services	Project post-mortem review	2016-04-12	2016-04-12	0,00	0,00	0,00	0,0
274	26	United Software	Add-on services	Transition to support team			0,00	0,00	0,00	0,0
170	26	Zibura Technologies	Hardware implementation	Transition to support team			0,00	0,00	0,00	0,0
144	26	Altima Technology	ERP deployment	Transition to support team			0,00	0,00	0,00	0,0
150	24	Zibura Technologies	Hardware implementation	Optimize			0,00	480,00	0,00	0,0
168	23	Zibura Technologies	Hardware implementation	System cut over			0,00	0,00	0,00	0,0
169	25	Zibura Technologies	Hardware implementation	Project post-mortem review			0,00	480,00	0,00	0,0

To enable this feature, contact OpenAir Customer Support.

## Multicurrency

The Multicurrency feature provides support for transactions in currencies other than your default currency. For example, the feature lets you reimburse employees expenses, invoice customers, recognize revenue, and run reports in multiple currencies. After you enable the feature, you can:

- Set the different currencies your company uses for transactions.
- Set a **Currency** for all relevant entity records and work with multiple currencies in OpenAir.
- Download historical currency cross rates as a CSV file.

Additional optional features also give you access to advanced multicurrency functionality, for example:

- The ability to modify historical currency cross rates. See [Edit Exchange Cross Rates](#).
- The ability to define arbitrary custom currencies for reporting purposes. See [User-Defined Reporting Currencies](#).

Currencies
Set exchange rates View exchange rates Multi-currency

Cancel SAVE

Select currencies available:

United States Dollars (USD) Default

British Pounds (GBP)

Canada Dollars (CAD)

Australia Dollars (AUD)

Euro (EUR)

Select...

Select...

Select...

[Add rows]

To enable the Multicurrency feature and discuss advanced multicurrency functionality, contact your OpenAir account manager or OpenAir Professional Services.

**Note:** You cannot disable the feature after you create transactions and records that rely upon it. All OpenAir accounts include the capability to create expense receipts in any of the system-supported currencies even if all your business transactions are done in the default currency for your account. You only need to enable the Multicurrency feature if your business uses more than one currency for transactions.

## Multiple Schedule Exceptions Per Day by Time Off Requests

Companies often have varying holiday policies that allow for half or partial working days that occur the day before an official holiday. For example, some companies will allow for a half day the day before Christmas. In such a case, some employees may choose to take the rest of the day off as part of their personal time off (PTO).

For accounts that have the company setting "Automatically create schedule exceptions when a time off request is approved" enabled but don't have this feature enabled, a company schedule exception could be entered for the half day. However, for the user to take the rest of the day off, an exception on the user's work schedule would need to be manually created. With this feature, users can enter a time off request even if there is an existing company schedule exception for the same day.

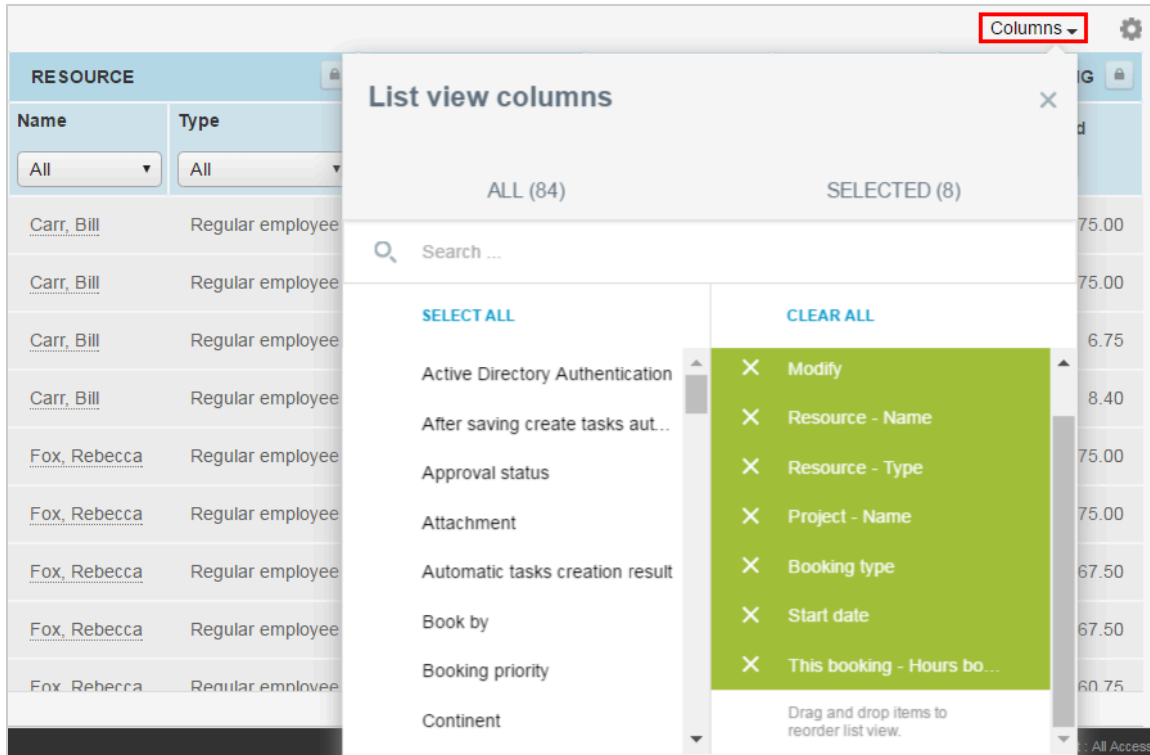
If there is an existing company schedule exception for partial hours, users can create and submit a time off request for that same day (available time permitting). In addition, users can create and submit multiple time off requests for the same day.

**Note:** It is not possible to manually create more than one schedule exception on the same day for a company work schedule or an individual user level work schedule.

To enable this feature, contact OpenAir Customer Support.

## New Selector for Customizing List Views

The Columns Selector makes arranging your list views a snap.



Click the Columns button in any list view to open a Columns Selector menu. From here, you can select the columns you want to see in this list view. You can also click any column in the "Select All" list to instantly add it to the displayed columns. Additionally, you can drag a column to reposition it in the list.

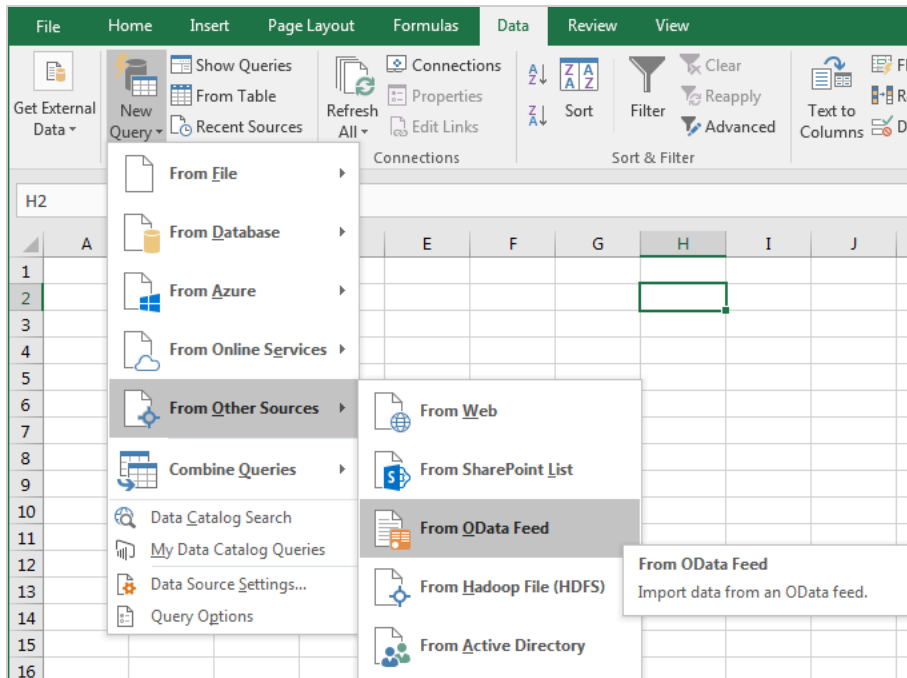
Use the Search field to limit the columns which appear in both the "All" and "Selected" columns.

**Note:** The "Customize list view" in the Cog menu will still be available as an option for arranging columns.

To enable this feature, contact OpenAir Customer Support.

## Business Intelligence Connector

Connect your Business Intelligence tools directly to OpenAir with OData.



The Business Intelligence Connector feature gives you point and click access to OpenAir data from existing reporting, business intelligence, workflow, and integration applications.

The Business Intelligence Connector provides the following features:

- Publish reports and provide access to the report data from OData.
- Publish list views giving users real-time access to OpenAir data with OData. User access rights configured in OpenAir are enforced preventing access to data the user does not have permission to see. All essential OpenAir list views are supported.
- Role permissions are supported to give administrators control over who can publish data.
- Access to published reports are available using the `NSOA.report.list` and `NSOA.report.data` user scripting functions.
- Use published list views like custom queries and read the latest list view data in your OpenAir form and scheduled scripts with the `NSOA.listview.list` and `NSOA.listview.data` user scripting functions.

See the  [OpenAir Business Intelligence Guide](#) for more details.

**Note:** The Business Intelligence Connector only supports the latest version of OData V4 / JSON (Open Data Protocol).

To enable this feature, contact your OpenAir account manager. This feature does not support SAML users.

## Overlapping Timesheets and Envelopes at the Role Level

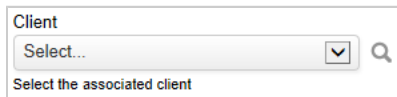
With this feature, you can allow different roles to have access to the Overlapping Timesheets and Expense Reports feature.

To enable this feature, contact OpenAir Customer Support.

## Pick List Custom Field

With this feature, create a custom field with values from existing list data within a OpenAir account such as users, customers, or projects. The benefit of this feature is that the pick list populates with current account data and thus eliminates the need for an administrator to actively manage the values list of the custom field.

To enable this feature, contact OpenAir Customer Support.



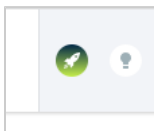
## Product Updates Panel

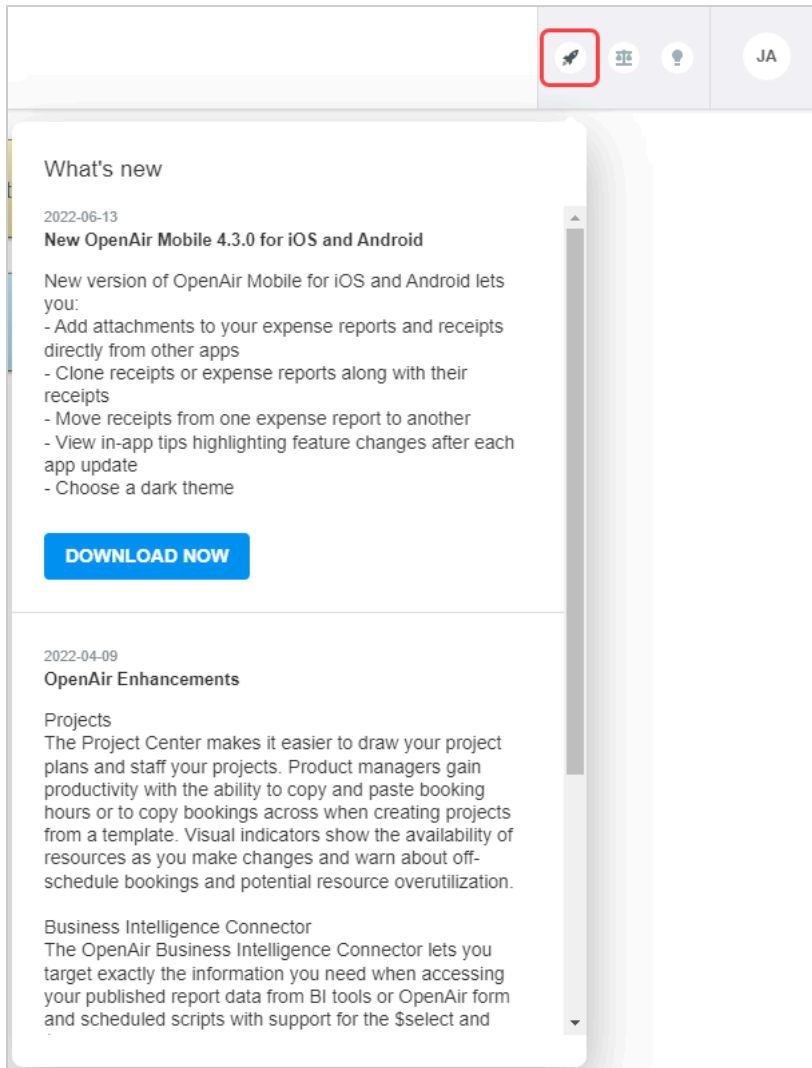
View new release highlights and other product updates from the OpenAir UI.

Click the Product Updates utility button to view a panel with new release highlights and other product updates. The Product Updates utility button is highlighted after each release to indicate that there are new product updates available. Click **Read More** to view the full release notes in the OpenAir Help Center.

**Note:** Only account administrators and users with the View Help Center role permission can access the product access panel.

This feature is enabled by default. To disable or enable it, contact OpenAir Customer Support.





## Proxy Approver Notifications

Add proxy approvers as recipients in notification email messages about new transactions awaiting approval.

Employees with the role permission **Create own proxies** can designate proxy employees who will be able to log in and perform a function on their behalf. If the proxy employee can approve transactions on behalf of the proxied employee and the Proxy Approver Notifications feature is enabled, the proxy employee receives notification email messages when a transaction is submitted for the proxied employee's approval.

**Note:** Proxy approver notifications are sent only to proxy employee designated as a proxy by the proxied employee.

Proxy approver notifications are not sent if the proxy employee was added by an account administrator or a user with the relevant role permissions on the proxied employee's employee record.

To enable this feature, contact OpenAir Customer Support.

## Publish Shared Reports using BI Connector

Publish your shared reports with owner or recipient access privileges and take control of the data you've published.

Name	Publish status	Last published	Action	Share status	Class
2.3.2 Project Burn (\$)	Successfully published with recipient's permissions	2018-03-01 09:32:35	[Publish icon]	Shared with 3 employees	Account-wide - Company summary
3.1.1 Booked Utilization - Monthly	Never published		[Publish icon]	Not shared	Resource - Employee summary
3.2 Supply vs. Demand Report	Never published		[Publish icon]	Not shared	Account-wide - Job code summary
4.2 Timesheet Status Report	Never published		[Publish icon]	Not shared	Timesheet status

With this feature, shared reports can be published with the same data access privileges as the report owner, or restricted to the access privileges of each report recipient.

The report owner decides when they publish the report, and the administrator controls the publish policy with role permissions.

When publishing reports with recipient permissions, each recipient must then publish the shared report data from OpenAir into their business intelligence tool. To access the report, recipients must have either the **Download Reports** or the **Publish Reports** permission to access the report in their business intelligence tool. The data recipients see in the business intelligence tool will be limited to what their own respective privileges allow.

**Note:** This feature enables the **Enable publishing of shared reports to OData service with owner's permissions** role permission, which allows users to publish shared reports.

To enable this feature, contact OpenAir Customer Support.

## Query Builder

Use the Query Builder feature to create complex and customized notifications for events throughout OpenAir.

Query Builder notification conditions are organized into groups which each contain a condition statement such as "if all of the following conditions are true" or "if none of the following conditions are true". A notification is sent when the conditions you've created are met.



**Important:** Conditions with groups can only be created with this feature enabled. If you later disable this feature, notifications created when this feature was enabled will be deactivated if they contain groups.

To enable this feature, contact OpenAir Customer Support.

The screenshot shows the 'Notification name for invoice is submitted' configuration page. At the top, the 'Rule name' is set to 'Zibura Invoice Submitted'. Below this, the 'Send a notification ...' section is active, showing a dropdown menu set to 'If ALL of these conditions are TRUE'. There are two buttons: 'ADD CONDITION' (green) and 'ADD GROUP' (orange). The conditions list includes:

- Client includes Zibura Technologies
- Credit amount is greater than 30000.00
- A group containing:
  - Date submitted is greater than 03/24/17
  - Accounting date is less than or equal to 02/28/17

Each condition has a trash icon for deletion. A plus sign button is at the bottom left of the conditions list.


### To create a notification using Query Builder:

1. Go to Administration > Application Settings > [Select the module settings which requires a notification] > Notifications.
2. Click the Create button and click the type of notification you want to create under "New". The new notification form appears.
3. Enter a "Rule name" for the notification. This name will appear in the Notifications list view.
4. In the "Send a notification ..." section, click the dropdown list and select the appropriate condition statement. The following condition statements are available:
  - If ALL of these conditions are TRUE
  - If ALL of these conditions are FALSE
  - If ANY of these conditions are TRUE
  - If ANY of these conditions are FALSE
5. Click the ADD CONDITION button to add new conditions to condition statement. Click the ADD GROUP button to add a new condition statement to which conditions can be added.

**Note:** You can also add conditions to a group using the + icon under the group's condition statement.

6. In the "Notify" section, select who the notifications should be sent to when triggered.
7. In the "Email message" section, enter the subject of the email which will be sent when the notification is triggered, and any text you would like to have in the Email body. Use the "Field" dropdown list to add variables to the email body.
8. In the "Other" section, select "Active notification" to allow the notification to trigger in OpenAir.
9. Click **Save**.

### To delete a group or condition in Query Builder:

1. Click the delete  icon next to the condition or group you want to delete.


### To move a group or condition to a new location within the query in Query Builder:

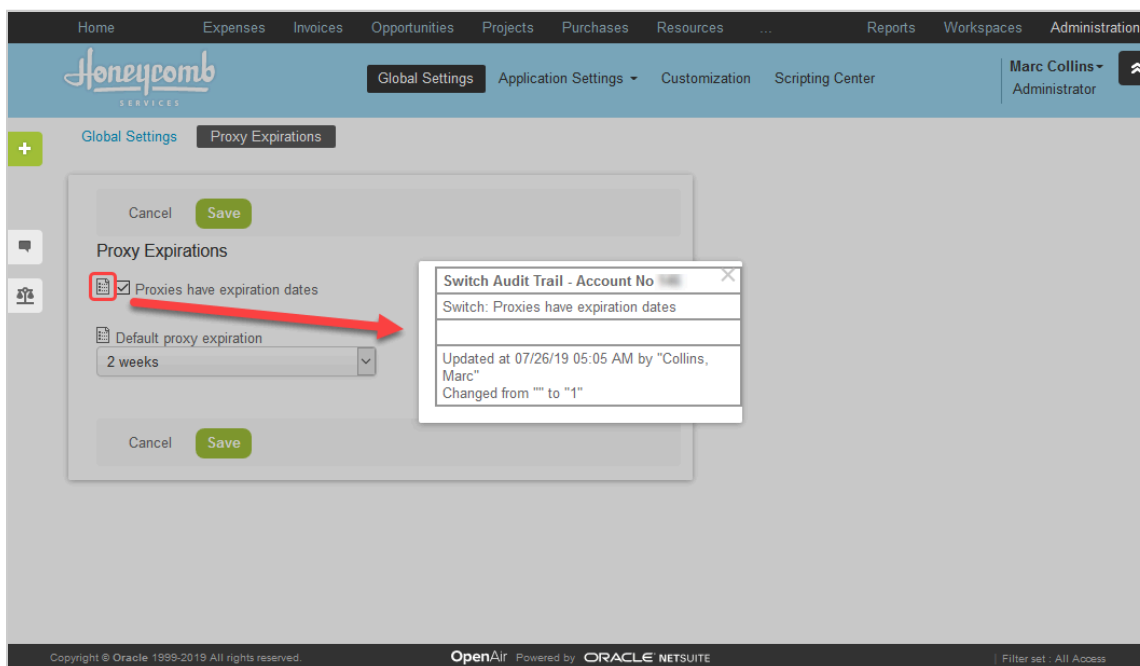
1. Click the  icon on the left of the group or condition and drag it to a new location within the query.

**Note:** When you drag a group which has conditions associated with it, both the group and its conditions are moved together.

## Quick Audit Trail for Global Settings

The Quick Audit Trail for Administration Settings optional feature enables you to keep track of changes made to Global Settings and determine the impact it has on the account. To enable this feature, Contact OpenAir Customer Support.

When the feature is enabled, an audit trail icon  next to the setting label indicates that an audit trail is available. Click the Show audit trail icon to display a popup window showing the account number, the name of the company switch, and a history of changes made, when, and by whom.



The screenshot shows the OpenAir Global Settings interface. The top navigation bar includes Home, Expenses, Invoices, Opportunities, Projects, Purchases, Resources, Reports, Workspaces, and Administration. The main content area is titled 'Global Settings' and 'Proxy Expirations'. A red box highlights the audit trail icon next to the 'Proxies have expiration dates' checkbox. A red arrow points from this icon to a popup window titled 'Switch Audit Trail - Account No'. The popup displays the switch name 'Proxies have expiration dates', the update date and time 'Updated at 07/26/19 05:05 AM by "Collins, Marc"', and the change description 'Changed from "" to "1"'. The footer of the interface includes the copyright notice 'Copyright © Oracle 1999-2019 All rights reserved.', the OpenAir logo, and the text 'Powered by ORACLE NETSUITE'.


Audit trail information is available on several forms in Administration > Global settings. These include:

- Account
  - Filter Set Settings
  - Integration: SAML Single Sign-on > [Select a SAML identity provider profile] (Requires the Self-Service SAML Identity Provider Configuration feature).
  - Optional Features
  - Proxy Expirations
  - Security Options
- Display
  - Email Settings
  - Interface: Display
  - Interface: Other
  - Print Settings
  - Regional Settings
  - Time Settings
- Organization
  - Approval Options
  - Tax Options
- Reports
  - Reporting Options

To enable this feature, contact OpenAir Customer Support.

## Quick Audit Trail for Custom Fields

The Quick Audit Trail for Custom Fields optional feature lets you keep track of changes made to custom fields directly from the entity form. When the feature is enabled, account administrators and users with the **View quick audit trail for custom fields** role permission can access audit information for custom fields.

 **Note:** The **View quick audit trail for custom fields** role permission is added to the role page when you enable this feature.

Feature extension:

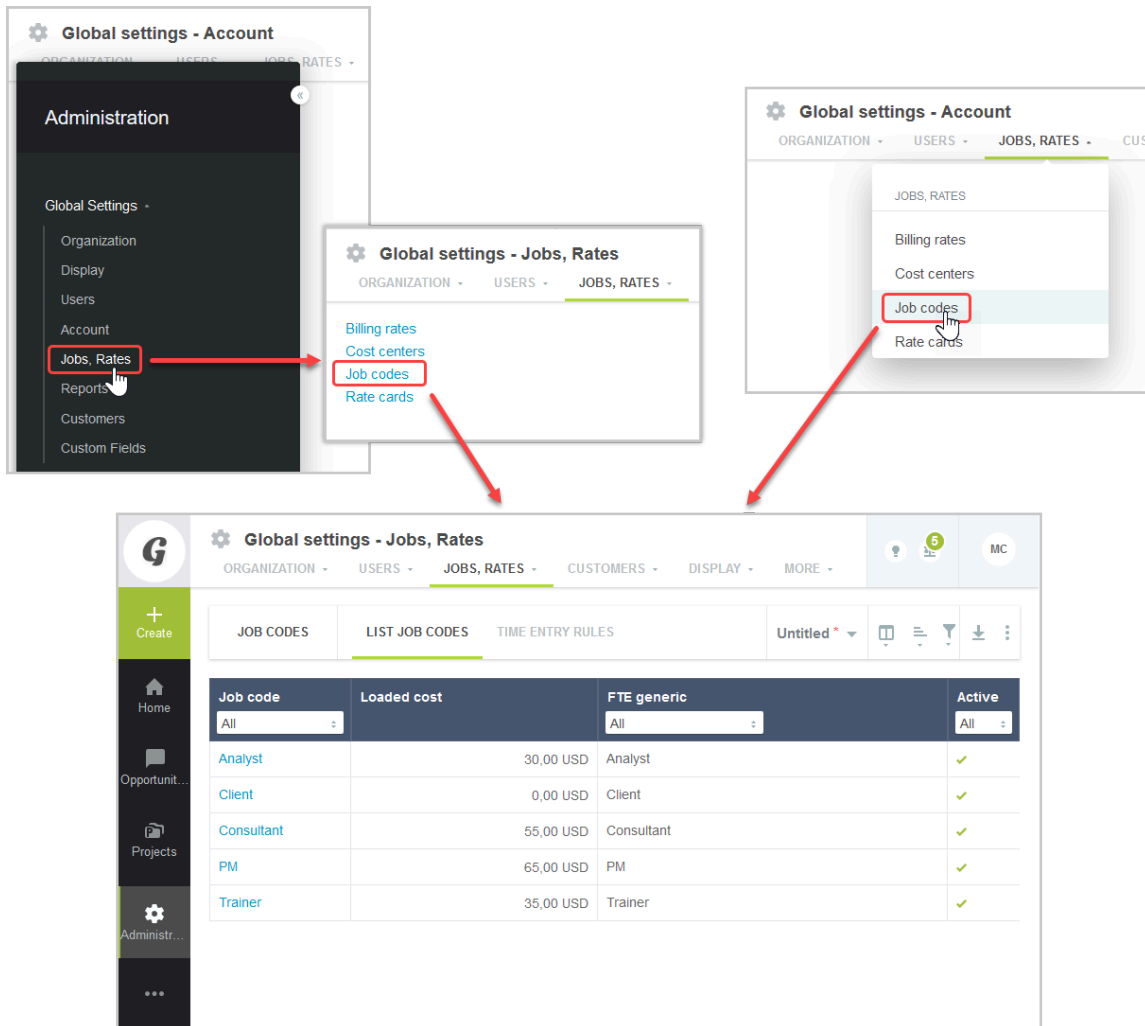
- **Custom Field Extended Audit** — Audit information is supported for all custom field types. However, for custom fields of type Text Area, Pick List, Multiple Selection and Allocation Grid, the custom field audit needs to be converted to an extended audit to include the values before and after the update in the audit trail. The Custom Field Extended Audit feature needs to be enable for your account to convert the custom field audit to an extended audit.

To enable the Quick Audit Trail for Custom Fields feature or Custom Field Extended Audit, contact OpenAir Customer Support.

## Redesigned Administration Module

This feature introduces a redesigned screen header with tab navigation and an overview screen for each global settings and application settings section in the Administration module.

The tab navigation lets you go from one screen to another without going back to the main overview screen. The main overview screen listing all global settings screens is now replaced with overview screens for each global settings section (Organization, Display, Users, Account, Jobs, Rates, Reports, Customers, Custom Fields).

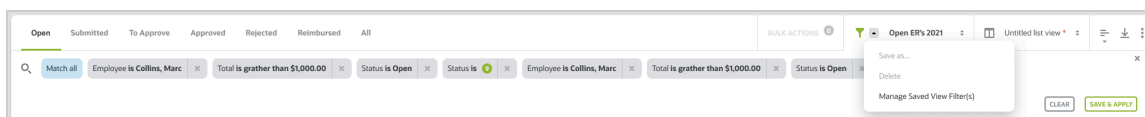



This feature is enabled by default. To disable the feature, contact OpenAir Customer Support.

## Redesigned Advanced Filters

Gain usability and canvas space when viewing, modifying or managing advanced filters.

The Redesigned Advanced Filters optional feature changes the user interface for advanced filters on redesigned list views. The redesigned advanced filters panel is compact and lists filter conditions horizontally instead of vertically. It lets you select and apply saved filters directly from the list view toolbar instead of the flyout panel.



For more information, see  [User Guide](#).

To enable this feature, contact OpenAir Customer Support.

## Replace Non-Alphanumeric Characters with Underscores in Column Titles and Metadata

Replace all non-alphanumeric characters with underscores in your data feed's column titles and metadata.

report82

User	Leave_accrual_rule	Accrual
Adams, Mary	Corporate sick days	160
Carr, Bill	Corporate sick days	160
Carter, Tom	Vacation Accrual rule	316
Collins, Marc	Vacation Accrual rule >5 years Tenure	168
Davis, Judy	Vacation Accrual rule	316
Ellis, Ed	Vacation Accrual rule >5 years Tenure	199
Foster, Tim	Vacation Accrual rule	300
Fox, Rebecca	Vacation Accrual rule	320
Garcia, Juan	Vacation Accrual rule	296

When this feature is enabled, space characters in column titles are replaced with underscore characters.

Other special characters are also replaced with underscores, including: %?!@:~`+-#\$\$^ &\*()ú!\$~ |

All non-ASCII, non-alphanumeric characters are replaced also replaced with underscores. In addition, if a column name's first character is a number, an additional underscore will be added at the beginning.

This feature is especially useful for supporting Microsoft SSIS integrations.

To enable this feature, contact OpenAir Customer Support.

## Restrict Specific Custom Fields from Being Copied

OpenAir maximizes the use of user time by allowing cloning, duplicating, repeating, copying in projects, expenses, resources, timesheets, and workspaces. In some companies, custom fields placed on receipts, charges, bookings, billing rules, and tasks could create problems if reproduced. Therefore, it may be desirable not to allow these custom fields to be copied. You can designate custom fields as restricted from duplication by checking the **Never clone, repeat, duplicate or copy this field** box on the custom field properties form.

To enable this feature, contact OpenAir Customer Support.

## Save and Load List View Configuration

Save and load list view configurations and share them with your colleagues.

	Active	% Complete	↑ Project	Project manager	Start Date	Finish Date
<input type="checkbox"/>	All		H	All	All	All
<input type="checkbox"/>	✓	<div><div></div></div> 50%	<a href="#">Hardware implementation</a>	Porter, Marie	09/05/12	08/17/14
<input type="checkbox"/>	✓	<div><div></div></div> 100%	<a href="#">HRIS and payroll setup</a>	Kelly, Joan	06/11/12	11/29/12
<input type="checkbox"/>	✓	<div><div></div></div> 81%	<a href="#">HRIS system configuration</a>	Ellis, Ed	08/12/03	06/23/05
<input type="checkbox"/>	✓	<div><div></div></div> 0%	<a href="#">HRMS integration</a>	Porter, Marie	01/06/14	01/29/14

4 rows

This feature saves your list view configurations, including which columns appear in the list, column order, sort-by column, and the sorting order. You can then reload the configuration any time you want to use it, or create alternate list view configurations. Finally, you can create public list view configurations which your other users can apply or set a default list view configurations which will be applied for new users and for all users currently using the system default or “Untitled” configuration.

You can save list view configurations for all existing list views. Saved list view configurations are linked to the list views they can be applied to. For example, your project list views have their own sets of list view configurations, as do expense list views and invoice list views.

To enable this feature, contact OpenAir Customer Support.

**Note:** This feature also enables the **Create public list views** user setting, which can allow users to create list view configurations which other users can also see and use.

## Single Sign-On Integration Leveraging SAML

The SAML Single Sign-On (SSO) feature lets you use an external identity provider service to manage user access to your OpenAir account using the Security Assertion Markup Language (SAML) protocol. SAML enables single sign-on (SSO), a scheme that allows users to sign in to one application — the identity provider — and automatically have access to separate applications — the service providers — without having to sign in to each of these other applications separately. It provides a method of secure integration with existing, on-site authentication infrastructures without exposing these services to direct public access, and enables federation of user identity across any number of additional services. SAML works well as a transport for LDAP and other popular authentication back-ends.

The SAML Single Sign-On feature lets you:

- Configure the SAML Single Sign-on feature to work with multiple identity providers.
- Review configured identity providers from a list view.
- Configure the profile and upload the metadata XML file for each identity provider.
- Set any identity providers as active. Only active identity providers can be used for service provider or identity provider initiated single sign-on.
- Select one default identity provider. Service provider initiated single sign-on request are sent to the default identity provider when using the OpenAir sign-in page for single sign-on users.

Integration: SAML Single Sign-On

All

Untitled\*

Identity Provider name	Active	Default	Notes	Updated	SAML Identity Provider meta-data	Service Provider initiated SSO
Google	✓		Expires on Dec 01, 2022	09/08/22 07:14 AM	selfservice1_30880.xml	✓
Legacy profile	✓	✓	Expires on Nov 01, 2022	09/08/22 07:14 AM		✓
OKTA	✓		Expires on Jan 01, 2022	09/08/22 07:15 AM	selfservice1_10880_single_line....	✓

To enable this feature, contact OpenAir Customer Support.

## Stop Slow Lists

Stop lists which take too long to load. With this feature enabled OpenAir will generate a message when the set time threshold has been reached and allow the user to either stop or keep going.

To enable this feature, contact OpenAir Customer Support.

## Stop Slow Reports

Stop reports which take too long to load. With this feature enabled OpenAir will generate a message when the set time threshold has been reached and allow the user to either stop or keep going.

To enable this feature, contact OpenAir Customer Support.

## Suppress Email Notifications or Add Addresses to Notifications

Users can selectively choose to suppress email notifications when they make changes to bookings, issues, tasks, and projects. For example, a user may not want for a minor modification to trigger an email. To suppress email notifications, when in the edit form of the associated entity, select a box indicating that email notification is suppressed. An email will not be sent to the notification list. Set up a custom field in each entity for the suppress email notification option and it displays in the associated edit forms.

Cancel Save & Submit Save Save & create another

**New booking**

Resource  
Carr, Bill

Client : Project  
Altima Technology : ERP deployment

Task  
8: Resolve open issues

Period during which to book this resource  
Start date (MM/DD/YY) \* 02/22/16 End date (MM/DD/YY) \* 02/26/16

Book by  
☒ Percentage of time: 100  
☐ Number of hours: 0

Booking type  
Open

Requester  
Collins, Marc

☐ Suppress email notification

Notes

Additionally, users can send notifications to additional email addresses for OpenAir and non-OpenAir users. These users may include those who may not routinely be notified of task or issue changes. Enter the email addresses in the text box for “E-mail addresses to cc” on the Edit tasks and Create or Edit issues forms. This text box displays the feature is enabled.

To enable this feature, contact OpenAir Customer Support.

## Unexport Records from a Specific Application by UI

OpenAir enables records to be marked as un-exported by **Run an action** in list views. This includes records in timesheets, expense reports, invoices, and revenue recognition transactions. OpenAir has enhanced this functionality with the ability to mark records as being un-exported from a specific application (for example IM). In addition, users can choose to mark the parent, child, or both records as being un-exported (for example invoices only, charges only, or invoices and charges).

To allow specific users to un-export records, go to Administration > Global Settings > Users > Employees > [select an Employee]. In the respective sections (for example Timesheet Options), check the option **The employee can mark [timesheets] exported**.

To enable this feature, contact OpenAir Customer Support.



**Timesheet Options**

Timesheet duration  
Company setting ▼

☐ Allow the employee to un-approve a time off request

☐ Enable start and end time entry on timesheets

☐ The employee can un-export timesheets

☐ Display all weeks for timesheets containing multiple weeks

☐ Allow the employee to un-approve a timesheet

☐ Sort timesheets alphabetically by client and project

☒ Timesheet required

☒ The employee can mark timesheets exported

☐ Enable Approvals on Mobile apps for Timesheets

All ▼

Open Submitted **Approved** Rejected Archived

	Start Date
<input type="checkbox"/>	All
<input type="checkbox"/>	09/21/15
<input checked="" type="checkbox"/>	11/11/13
<input checked="" type="checkbox"/>	11/11/13
<input checked="" type="checkbox"/>	11/11/13
<input type="checkbox"/>	11/11/13
<input type="checkbox"/>	11/11/13
<input type="checkbox"/>	11/11/13
<input type="checkbox"/>	11/11/13

**Actions**

**Three timesheets selected**

☒ No action on the selected timesheets

☐ Archive the selected timesheets

☐ Create a PDF timesheet report with the selected timesheets

☒ Un-export the timesheets marked exported to

All applications ▼

Timesheets and Time entries ▼

☐ Mark the selected timesheets exported to

▼

☐ Change accounting date to

[US & Canada Close] ▼

Cancel **OK**

[Use report form for this session](#)

[Use OA2 User Interface for this session](#)

[Refresh un-export application list](#)

## Use Days Instead of Hours for All Time Entries

Enable this feature to use days instead of hours for time entries.

After you enable this feature, go to Administration > Global settings > Work schedule > [select schedule] and change the value for "Work days per day for this company work schedule" from "7.5" or "8" to "1", for example. This should be done for every work schedule, especially those where the number of associated employees is more than zero.

To enable this feature, contact OpenAir Customer Support.



**Important:** You should not enable the Timesheets setting **Enable start and end time entry on timesheets** when the feature **Use Days Instead of Hours for All Time Entries** is enabled.

If you enable **Enable start and end time entry on timesheets**, when users enter a start time and end time in OpenAir, the duration is calculated in hours and not converted to days.

## User-Defined Reporting Currencies

Enable this feature to create user defined currencies for reporting in the Multi-currency tab.

After you have added the currency symbol, name and rate in the Multi-currency tab, the user defined currencies will be available for reporting but not for data entry and will have both the symbol and name displayed in the currency drop-down and report views.

When enabled, go to Administration > Global Settings > [Organization] Currencies > Multi-currency.

To enable this feature, contact OpenAir Customer Support.

Cancel Save

Select currencies available:

United States Dollars (USD) ▼ Default

British Pounds (GBP) ▼

Canada Dollars (CAD) ▼

Australia Dollars (AUD) ▼

Euro (EUR) ▼

Select... ▼

Select... ▼

Select... ▼

[Add rows] ▼

▼ **Employee defined reporting currencies**  
You can define arbitrary currencies to use in reporting

Symbol	Name	Rate
<input type="text"/>	<input type="text"/>	<input type="text" value="1"/>
<input type="text"/>	<input type="text"/>	<input type="text" value="1"/>
<input type="text"/>	<input type="text"/>	<input type="text" value="1"/>

[Add rows] ▼

## Wrap Text in List View Cells

You can select to wrap long text and text area field values on multiple lines in list view cells with this or display it in truncated form on a single line.

- **Single line** (Default) — By default, redesigned list views display text and text area field values on a single line by default. Line feeds are removed to show more information. list views are more compact.

If the entire text does not fit the cell, only part of the text is displayed with ellipses to indicate the text is truncated. To view the full text, point to the cell or click **Read more** inside the cell (for longer text content).

ABC Co.	<a href="#">simple slack test</a>		Active
Altima Technology	<a href="#">Project Center implementation</a>		Active
This company name...	<a href="#">Data Center Migration to Oracle Cloud Infrastructure</a>		Active
Pegasus Inc	<a href="#">Pegasus</a>		Active

ABC Co.	<a href="#">simple slack test</a>		Active
Altima Technology	<a href="#">Project Center implementation</a>	This is an example of a very long text area cell content. It demon...	Active
This company name is too long to fit in a small box	<a href="#">Data Center Migration to Oracle Cloud Infrastructure</a>	This is an example of not so long text area cell content to demonstrates th...	Active
Pegasus Inc	<a href="#">Pegasus</a>	This is a short text	Active

- **Wrap text** — If the Wrap Text in List View Cells feature is enabled for your account, OpenAir wraps long text and text area field values on multiple lines in list view cells. List views are less compact. For longer text content, only part of the text is displayed with ellipses to indicate the text is truncated. To view the full text, click **Read more** inside the cell.

ABC Co.	<a href="#">simple slack test</a>		Active
Altima Technology	<a href="#">Project Center implementation</a>		Active
This company name is too long to fit in a small box	<a href="#">Data Center Migration to Oracle Cloud Infrastructure</a>		Active
Pegasus Inc	<a href="#">Pegasus</a>	This is a short text	Active

ABC Co.	<a href="#">simple slack test</a>		Active
Altima Technology	<a href="#">Project Center implementation</a>	This is an example of a very long text area cell content. It demonstrates the option to wrap long text cells or to displ...	Active
This company name is too long to fit in a small box	<a href="#">Data Center Migration to Oracle Cloud Infrastructure</a>	This is an example of not so long text area cell content to demonstrates the new wrap text and single line options.	Active
Pegasus Inc	<a href="#">Pegasus</a>	This is a short text	Active

Longer text area cell content is truncated whether the wrap text option is enabled or disabled. To view the full text, click **Read more**. The full text appears in a popup box. Click the close icon **x**, press the Esc key or click outside the box to close the popup box and return to the list view.

**Note:** These display options do not apply to the **description** column in the following list views. The entire cell content is always shown and line feeds are supported.

- Projects > [Select a Project] > Financials > Billing > Rules
- Projects > [Select a Project] > Financials > Recognition > Rules

To enable the **Wrap text in list view cells** feature, contact OpenAir Customer Support.

# Timesheets

The following optional Timesheets features are available in OpenAir. Some features require OpenAir Customer Support to enable them for you.

- Automatically Create Overlapping Timesheet
- Automatically Receive PDF Attachments of Approved Timesheets and Expense upon Approval
- Calculate Remaining Hours Using Approved Hours Instead of Worked Hours
- Configure Time Entry Rounding at the User Level
- Filter Timesheet Report by Project
- Line Item Rejection in Timesheets
- Prevent Entry of Future Time at the User Level
- Proxy Confirmations
- Self-Rejection of Timesheets
- Set the Timesheet Duration At the User Level
- Time Entries Match Task Assignments
- Time Entry Grid Filtering
- Use Zero Hours Rather than Planned Hours for Users' "Hours Remaining" Estimates

## Automatically Create Overlapping Timesheet

Auto-create overlapping timesheet for second part of the week at month end. This feature requires use of the 'Prevent the entry of time for different months on single timesheet' feature.

To enable this feature, contact OpenAir Customer Support.

## Automatically Receive PDF Attachments of Approved Timesheets and Expense upon Approval

Employees within a company may need to download a hard copy of their approved timesheets or expense reports. For example, on occasion, hard copies of expense reports will need to be attached to invoices that are being sent to a customer. Without this feature, users can download a PDF version of the report from within the timesheet or expense report.

With this feature enabled, users can automatically receive a PDF attachment of the approved timesheet report or expense report. A PDF view of the report will be attached to the email notifications for approved timesheet and expense reports.

To enable this feature, contact OpenAir Customer Support.

## Calculate Remaining Hours Using Approved Hours Instead of Worked Hours

Enable this setting to calculate hours remaining as estimated hours minus approved hours, instead of estimated hours minus worked hours.

To enable this feature, contact OpenAir Customer Support.

## Configure Time Entry Rounding at the User Level

Time entries can be entered on a timesheet in different increments. For billing purposes, it may be necessary to round these time entries depending on contractual agreements. For some companies, certain groups of users may need different rounding rules applied based on their location. Currently, time entry rounding rules are applied at the account level for all users. OpenAir has the ability to configure the time entry rounding option on a per-user basis.

To enable this feature, contact OpenAir Customer Support.

## Filter Timesheet Report by Project

Project approvers who have the ability to view multiple projects on one timesheet report can use the "Project filter" to view hours for a specific project. The timesheet report refreshes and displays only the hours for the project selected. This provides a quick way to ascertain the number of hours on a timesheet applied against a specific project.

To enable this feature, contact OpenAir Customer Support.

## Line Item Rejection in Timesheets

Use line item rejection in timesheets to streamline operations. Instead of delaying the invoice process because of an error in one time entry, reject the entry in question and continue to process the timesheet and invoice the already approved entries. This permits users and managers to save time for approvers while viewing individual entries.

To enable this feature, contact OpenAir Customer Support.

For  
Bill Carr  
Department : London  
21 Main Street  
London London NW1  
United Kingdom

**Each line item can be approved or rejected individually**

Date	Client	Project	Task	Notes	Hours
01/25/16 <input checked="" type="radio"/> approve <input type="radio"/> reject	Foster Software	ERP implementation	Identify gaps		8
Day Total					8
01/26/16 <input checked="" type="radio"/> approve <input type="radio"/> reject	United Software	Add-on services	Plan deployment		8
Day Total					8
01/27/16 <input checked="" type="radio"/> approve <input type="radio"/> reject	United Software	Add-on services	Plan deployment		8
Day Total					8
01/28/16 <input checked="" type="radio"/> approve <input type="radio"/> reject	Monrovia Database	Upsell account audit	Demonstrations		8
Day Total					8
01/29/16 <input checked="" type="radio"/> approve <input type="radio"/> reject	Foster Software	ERP implementation	Identify gaps		8
Day Total					8
Total					40
Total hours - [No time type]					40

**Note:** If timesheet rules are configured, administrators can choose to have the rule ignored upon the resubmission of rejected time entries. To enable this option, go to Administration > Application Settings > Timesheets > Timesheet rules. Check the option **Ignore rules on submission of timesheets with individually rejected time entries** and save. Users will not see warnings or errors for timesheet rules if submitting a timesheet that contains rejected time entries.

## Prevent Entry of Future Time at the User Level

OpenAir's timesheet functionality permits users to log time that has been worked on different projects. However, for compliance purposes, managers may want to have their employees only enter time for the current week's timesheet and restrict the ability to enter time entries for future dates. Previously, OpenAir had released functionality that would prevent users from entering future time entries. With this feature enabled at the account level, all users were restricted from being able to enter time for future dates. For certain companies, policies may allow a certain group of users to enter time for future dates, but not others. OpenAir has further enhanced this functionality to include the ability to set this configuration on a per-user basis.

To enable this feature, contact OpenAir Customer Support.

## Proxy Confirmations

Many companies allow users to leverage OpenAir's proxy capabilities to sign in on behalf of another user to either submit or approve a timesheet. Allowing users to proxy in as other users may prevent delays in the billing process. For compliance purposes it may be required that the original submitter or approver of a timesheet confirm acknowledgment that the proxy action has taken place.

For example, if Mary Adams was on vacation and Bill Carr submitted her timesheet on her behalf, Mary Adams would need to confirm the timesheet to acknowledge that Bill submitted it on her behalf. This feature enhances the proxy capabilities to allow users to view which timesheets need to be confirmed by them due to proxy submission or approval.

When enabled, existing role settings will need to be modified to allow for timesheet confirmations. All newly created roles will have the option enabled automatically. To modify a role, go to Administration > Global Settings > Users > Roles > [select a role]. Select the option **View confirmed timesheets**.

- A new dashboard link, **X Timesheets awaiting your confirmation**, under the **Reminders** section will indicate to the user that there are timesheets waiting for their confirmation. When clicked, users will be brought to the **Confirmed** tab in the Timesheets list view.
- A new tab for "Confirmed" is now available under the Timesheets tab. If there are timesheets waiting for confirmation because of a proxy submission or approval, those timesheets will be listed under the sub-links "Submitted waiting my confirmation" or "Approved waiting my confirmation". The "All" sub-link will list any timesheet that needs to be confirmed by a user. Timesheets that are bolded indicate timesheets that specifically need attention from that user.
- As part of the timesheet "Approval history", timesheets will have an additional status of [Confirmed], [Confirmation reject], or [Confirmation pending] to indicate that some confirmation action is needed or has been made.
- For auditing purposes, the Timesheets detail report now contains the report values "Submission confirmed by" and "Approval confirmed by" to indicate who confirmed the timesheet. Additionally, two additional filters for "Submission confirmation status" and "Approval confirmation status" have been added to filter results based on the confirmation status of timesheets. For example, managers

can run the report and filter on "Confirmation Pending" to view all timesheets that have not yet been confirmed by anyone. To access the Timesheets detail report, go to Reports > Detail > Timesheets.

To enable this feature, contact OpenAir Customer Support.

## Self-Rejection of Timesheets

When an employee submits a timesheet prematurely and wishes to make changes, the process required the entire timesheet to be rejected by an approver - whereupon changes can be made. With this feature, users can reject their own timesheet, thus eliminating the need for approvers to reject unnecessary incorrect timesheets.

Users will have the ability to reject their own timesheets if no approvals have occurred. When rejected, the timesheet will be moved to the "Rejected" status where the user can modify specific time entries and resubmit for approval. The approval history for that rejected timesheet will indicate that the owner has rejected the timesheet, and include any explanation.

**Note:** If line item rejections are enabled and specific line items on a timesheet have not been approved, each line item can be rejected by the timesheet owner.

**Note:** Approved timesheets cannot be rejected. Users can only reject their own timesheets if they haven't been approved or rejected already by an approver.

To enable this feature, contact OpenAir Customer Support.

## Set the Timesheet Duration At the User Level

This feature permits your users to set their own timesheet duration, overriding the default duration.

To enable this feature, contact OpenAir Customer Support.

## Time Entries Match Task Assignments

When this feature is enabled, if a user submits their timesheet they will receive an error if the time entry date is not within the task's start and end date (inclusive) range.

This is an account-wide setting that can be overridden on a per-task basis by the selection of a checkbox custom field.

To enable this feature, contact OpenAir Customer Support.

## Time Entry Grid Filtering

Use a hierarchy filter to limit the number of Customer:Project entries that display on a timesheet grid. Different types of hierarchies can be created for geographic locations or business units, or even for types of work or other characteristics that make sense for your company. When all users can view all projects, this feature helps reduce the size of these lists, making them more manageable. Select the setting for using the hierarchy as the primary project drop-down filter and assign projects to a hierarchy node. When a user specifies a node on the timesheet grid, the projects within that hierarchy are easy to locate.

To enable this feature, contact OpenAir Customer Support.

## Use Zero Hours Rather than Planned Hours for Users' "Hours Remaining" Estimates

This setting uses "0" for "Hours Remaining" estimates rather than using planned hours. This setting only affects project outline and list views.

To enable this feature, contact OpenAir Customer Support.



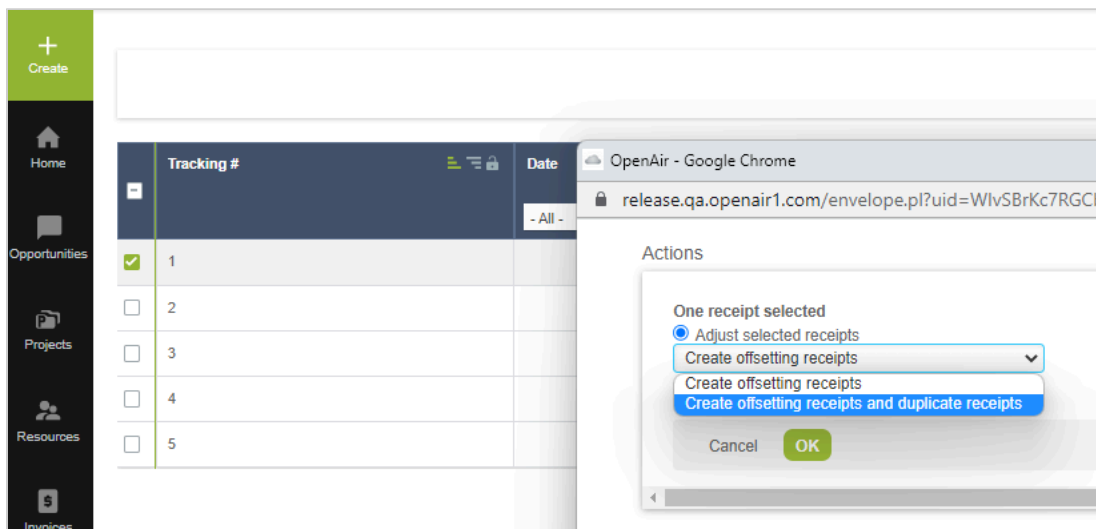
# Expenses

The following optional Expenses features are available in OpenAir. Some features require OpenAir Customer Support to enable them for you.

- [Adjust an Approved Expense Report](#)
- [Automating Tax Location](#)
- [Foreign Currency Receipts in Expense Grid](#)
- [View All Receipts on One List](#)

## Adjust an Approved Expense Report

This feature permits a user with the **Adjust approved envelopes** role to create 'offsetting receipts' in an 'adjusting envelope' by running the **Adjust selected receipts bulk action**. This can be used, for example, to zero out one or more receipts in an approved envelope.



Configuring this feature requires the following settings:

- Approval of envelope adjustments
  - Always require approval for adjusted envelopes
  - Do not require approval for adjusted envelopes
  - Require approval for adjusted envelopes only if net reimbursement amount is not zero
- Accounting date of adjusted envelopes
  - Adjusted envelopes have accounting date set by accounting date rules
  - Adjusted envelopes have accounting date of original envelope
- Accounting date of receipts in adjusted envelopes
  - Adjusted envelope receipts have accounting date of original receipt
  - Adjusted envelope receipts have accounting date set by accounting date rules

**Note:** Envelopes with net negative totals cannot be exported to systems that do not expect negative transactions, such as NetSuite. This may affect your usage of the expense report adjustment feature.

To enable this feature, contact OpenAir Customer Support.

## Automating Tax Location

When using input tax on expenses, one expense item could be taxed using several different tax locations depending on where the expense was incurred. For example, an expense item of “Meals” may be taxed at 10% in Germany, 15% in France and 20% in the UK. Expecting an employee to select the correct tax location for every expense item is unreasonable. Furthermore the list of tax locations from which to pick in enterprise international accounts can become very long and with no filtering or defaulting by employee extremely cumbersome to use.

To ease expense entry and minimize user error, OpenAir can default a tax location for a receipt based on:

- The expense item
- The geographical location in which the expense was incurred (defaults to the user's home location)

The screenshot shows the 'New receipt' form in OpenAir. The form includes fields for Tracking Number, Status, Client, Expense item, Task, Expense Location, Tax location, Date, Accounting date, Quantity, Price, and Currency. The 'Expense Location' field is highlighted with a red box and labeled '1.' The 'HST' and 'HST rate (%)' fields are highlighted with a red box and labeled '2.'. A 'RESET TO DEFAULT' button is also visible next to the HST rate field.

With this feature enabled, a user can (1) mark where a specified expense was incurred and (2) OpenAir can then automatically calculate the correct taxes based on the home location of user. The user can override this calculation if necessary.

**Note:** The calculation fields are highlighted if the user overrides the calculation. The user can reset back to the calculated values by clicking the **RESET TO DEFAULT** button.

To setup this feature your administrator needs to:

- **Administration > Application Settings > Tax Locations** - Create the required tax settings.

**Note:** It is recommended to use this for tax settings and not for tax locations.

- **Administration > Application Settings > User Locations** - Create the required user locations.

**Administration > Application Settings > Expenses > Expense item** - Fill out the new grid to match **User location** to **Tax location** combinations for the expense item.

The screenshot shows the 'Expense items' configuration page in OpenAir. The 'General' tab is active, showing details for an expense item named 'Meal'. The 'Type of expense item' is set to 'Regular'. The 'Price' is 0, 'Currency' is USD, and 'Unit measure' is empty. A checkbox for 'Per diem' is present. Below these fields is a table mapping 'User location' to 'Tax location'.

User location	Tax location
Alberta	GST 0, PST 15
Newfoundland	GST 0, PST 0, HST 15
Nova Scotia	GST 0, PST 15
Quebec	GST 0, PST 0, HST 13

To enable this feature, contact OpenAir Customer Support.

## Foreign Currency Receipts in Expense Grid

When creating an expense report that contains foreign currency receipts, by enabling this feature users can now enter and view information for all foreign currency receipts in the Expense Grid. The Expense Grid displays different currencies and associated exchange rates for the receipts. When the grid is saved, amounts are converted to the expense report default currency for reimbursement and will appear in the default currency on the expense report. If company settings allow, exchange rate amounts can also be modified in the Expense Grid.



# Projects

The following optional Projects features are available in OpenAir. Some features require OpenAir Customer Support to enable them for you.

- [Access All Tasks](#)
- [Additional Functionality for Expense Policies on Per-Project Basis](#)
- [Adjust Planned/Assigned Hours Based on Actual Work](#)
- [Allow employees with appropriate permissions to add project based items when they do not have permission to modify the project](#)
- [Allow Users to Unapprove Budgets](#)
- [Apply Phase Filtering in Time Billing Rules](#)
- [Automated Search Engine for Booking Creation](#)
- [Automatically Add New Users to Assignment Groups](#)
- [Customer Contact Information in Project Properties](#)
- [Close a Task for a Specific Employee for Timesheets and Expenses](#)
- [Control Editing Submitted Entities by Approvers via Role Permissions](#)
- [Date Filters Support for Incurred Vs. Forecast Revenue Recognition Transactions](#)
- [Default Options on Task Assignment](#)
- [Define Charges to Recognize in "As Billed" Revenue Recognition Rules](#)
- [Estimate to Complete \(ETC\) and Estimate at Completion \(EAC\) in Project Budgets](#)
- [Exclude Project from Charge Projections](#)
- [Hide the Daily, Weekly, or Monthly Resource Planner Options](#)
- [Hide the Project Progress Bar](#)
- [Inline Editing, Drag-and-Drop Functionality, and Enhanced Gantt Layout](#)
- [Inline-Editing in List Views](#)
- [New "Booking Type" Filter in Revenue Recognition Rule](#)
- [One Project Per Expense Report](#)
- [Optionally View and Assign Revenue Hours for Recognition Transactions](#)
- [Pagination for the Task Worksheet](#)
- [Phase/Task Filter in "Incurred vs. Forecast Rule"](#)
- [Portfolio Projects and Subordinate Projects](#)
- [Prevent Invoicing and Revenue Recognition on a Per-Project Basis](#)
- [Prioritize Recorded Time Over Booked Time for Charge and Revenue Recognition Projection](#)
- [Project Assignment Profiles](#)
- [Project Budget](#)
- [Project Center](#)
- [Project Status News Feed](#)
- [Project Status Summaries \(PSS\)](#)
- [Restrict Project Recalculation to Tasks Impacted by the Changes on the Project Outline, Gantt and Task Detail View](#)
- [Select Different Currencies for Loaded Cost Overrides](#)

- Set Preferred Landing Page for Projects
- Single Billing Cap Across Multiple Subprojects Within a Portfolio Project
- Show Billing Rules on Revenue Recognition Forms
- Task on Purchase Requests
- User-Level Outline View
- View Tasks for Inactive Projects in Task List View

## Access All Tasks

By default, employees can only enter time or expenses against the tasks that are assigned to them. When enabled, this feature allows employees to access, and to enter time and expenses against all tasks in the projects they have access to.



**Important:** This feature and the Close a Task for a Specific Employee for Timesheets and Expenses optional feature are mutually exclusive. It is not possible to enable both features for your account. See also [Close a Task for a Specific Employee for Timesheets and Expenses](#).

Consider all implications carefully before you enable this feature. When enabling this feature, ensure that employees only have access they need using all OpenAir access control features. For more information about access control, see the help topic [Configuring and Using Access Control](#).

## Additional Functionality for Expense Policies on Per-Project Basis

OpenAir has the ability to limit expense items on a per-project basis. Configuring expense policies on a per-project basis permits companies to dictate different policies based on the work being done. Work performed in different countries may have different policies for projects. Expense policy functionality has been further extended to include additional expense policy options at the project level.

With this feature, you can define what expense items can be selected on an expense report based on the project selection. This feature also adds a new expense policy description field where you can describe a particular project's expense policy.

To enable this feature, contact OpenAir Customer Support.

The screenshot shows the 'Expense policy' configuration window for a project named 'Hardware implementation'. The window has a sidebar on the left with options: General, Project approvals, Loaded hourly cost, Expense policy (selected), Additional information, and Transactional information. The main area is titled 'Expense policy' and includes a progress bar at 50%. Below the title, there are sections for 'Import an expense policy' (with a 'Select...' button), 'Allowed expense item options' (with 'Select...' and '[Add rows]' buttons), and 'Additional information' (with a 'Use as a project template' checkbox). The 'Allowed expense items' section is the primary focus, showing two lists: 'Available' and 'Selected'. The 'Available' list contains items like Airfare, Business meal, Car rental, Copies, Entertainment, Ground transit, Hotel, Mileage, Miscellaneous, and Phone. The 'Selected' list contains Airfare, Car rental, Ground transit, and Hotel. Between the lists are buttons for 'Add selected', 'Add all', 'Remove selected', and 'Remove all'. A note on the right states: 'All items allowed if nothing selected here. The Available list shows all the possible items. The Selected list shows all the selected items. Use the buttons at the bottom of the lists to move items between the lists.' At the bottom of the window are 'Cancel' and 'OK' buttons.

## Adjust Planned/Assigned Hours Based on Actual Work

OpenAir's project management capabilities allow project managers to assign hours for specific individuals assigned to the task. Often, managers will compare the number of hours that have been assigned against the number of hours worked thus far. As work is being done on the task, it is beneficial for managers to run accurate forecasting reports based on actuals.

For forecasting, it is ideal to have past planned/assigned hours updated to equal the approved hours. Without this feature, updating the planned/assigned hours accordingly is a manual process. With this feature enabled, OpenAir can streamline the process for updating planned/assigned hours based on actual worked hours on a per-task and per-user basis. Planned/assigned hours in the past are adjusted to equal approved hours and future planned/assigned hours can be re-cast in three different ways.

**Update planned hours from approved hours**

Cancel Save

- ☒ **Adjust end date of task(s), keeping current users' allocation**  
Percent of user's time will not be changed  
End date will be moved so that future planned hours equals remaining unworked hours
- ☐ **Keep end date of tasks, adjusting users' allocation**  
End date will be preserved  
User allocation will be adjusted so that future planned hours equals remaining unworked hours
- ☐ **Task is finished. Remove remaining planned hours**

**Apply adjustment to these tasks:**

☐ Migrate data

There are three ways to re-cast future task assignment hours:

1. Adjust end date of the task or tasks, keeping current users' allocation
  - Percent of user's time will not be changed
  - End date will be moved so that future planned hours equals remaining unworked hours
2. Keep end date of tasks, adjusting users' allocation
  - End date will be preserved
  - User allocation will be adjusted so that future planned hours equals remaining unworked hours
3. Task is finished. Remove remaining planned hours

To enable this feature, contact OpenAir Customer Support.

## Allow employees with appropriate permissions to add project based items when they do not have permission to modify the project

This optional feature lets employees with appropriate role permissions add project based items even if they do not have permission to modify the project.

By default, to add a project based item, employees:

- Must have the permission to modify the project. They must have any of the following:
  - Role permission **View and modify projects**.
  - Role permission **View and modify existing projects, but not create new projects**.
  - Explicit permission to modify a specific project controlled by the **Allow only the project owner or administrator or the selected employees to edit the project** option on the Project properties form (Projects > [Select a project] > Properties).
- Must have the appropriate role permission to view and modify, or to modify and create the project based item. For example:
  - **View and modify issues**, to add an issue.
  - **View and modify budgets**, to add a transactional budget.
  - **Create and modify project billing rules**, to add a project billing rule.
  - **Modify and create recognition rules**, to add a recognition rule.
  - **Modify and create recognition transactions**, to add a recognition transaction.

With this optional feature enabled, employees only need the appropriate role permission to view and modify, or to modify and create the project based item. Permission to modify the project is no longer required.

To enable this feature, contact OpenAir Customer Support.

## Allow Users to Unapprove Budgets

Give selected users the power to unapprove budgets. To enable this feature for a user, go to Administration > Global Settings > Users > Employees > [Select a user ID], scroll to Projects Options, select the "Allow the employee to unapprove a project budget" option, and click **Save**.

To unapprove a budget, go to Projects > Projects > [Select a project] > Project budgets > [Select an approved project budget] > click the edit icon, and click Submit/Approve. In the Approval History screen, click the "Click here" link in the unapprove message to unapprove the budget.

Approval history		
Status: Approved		
Date/Time	Action	Notes
09/14/16 05:14 AM	Submitted for approval by Marc Collins	
09/14/16 05:14 AM	Approved by Marc Collins	Automatic approval: The approver is the same employee as the submitter
You can un-approve this project budget. <a href="#">Click here</a> to continue.		

## Apply Phase Filtering in Time Billing Rules

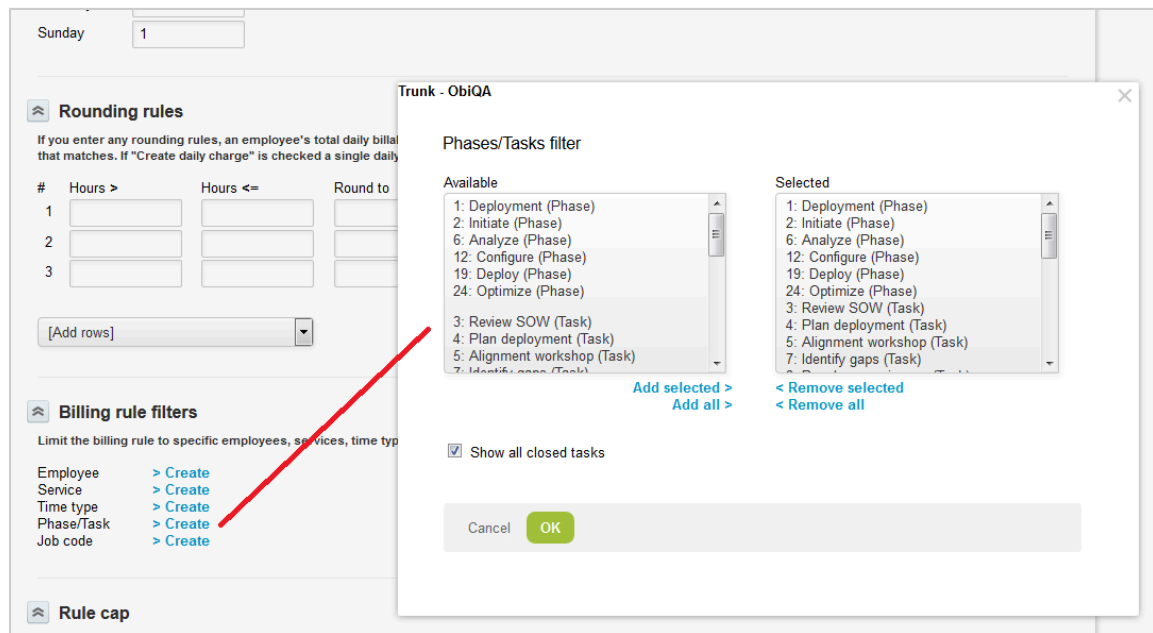
OpenAir's flexible project management capabilities allow you to create extensive project plans that include phases, sub-phases, and tasks. For companies that have large project plans and leverage the



existing task filter on time billing rules, it may be beneficial to have all newly created tasks picked by billing without the need to manually add the new task to the billing rule filter. For example, there may be a phase in the project plan called "Billable" and any task within that phase should be picked up for billing and all other tasks outside of that phase should not.

Without this feature, these tasks would need to be added to the Task filter within the time billing rule. In addition, any new task that is created under that phase would need to be manually added to the filter. OpenAir has enhanced time billing rule capabilities to include the ability to filter on phases. If a phase is selected in the filter, all tasks that are a part of that phase will be processed by billing. In addition, if a parent phase is selected, all tasks within that parent phase as well as any sub-phases will be picked up by billing.

To enable this feature, contact OpenAir Customer Support.



## Automated Search Engine for Booking Creation

This feature lets project manager assign generic resources to projects and tasks, or define the required skill set (assignment profile) for each project or task, then search for matching resources and select the resources to book. After the project manager selects the resources to book, OpenAir will:

- Create bookings automatically for the best matched resources based on search results.
- Initiate the booking approval process.
- Substitute generic resources for specific resources automatically when the bookings are approved.

## Example 1. Example of use

As a project manager, you would typically work through the following steps:

1. Create a project plan with tasks.
2. Assign generic resources to tasks. You can also select an assignment profile for each task if the Project Assignment Profile optional feature is enabled for your OpenAir account.
3. Launch the generic resource booking search. The search returns the best matching resources.
4. Preview search results and select the resources you want to book.
5. Select the option to create and submit the bookings for approval automatically.
6. OpenAir creates the bookings and initiates the booking approval process.
7. After a booking is approved, OpenAir replaces automatically the generic resource with the specific resource booked.

To enable this feature, contact OpenAir Customer Support.



**Note:** The Resource Booking Approvals optional feature must also be enabled for your account. See [Resource Booking Approvals](#).

To let project managers search for resources based on the required skill set instead of generic resources, enable the Project Assignment Profile optional feature. See [Project Assignment Profiles](#).

## Automatically Add New Users to Assignment Groups

Companies that leverage assignment groups are able to assign a group of users to certain projects and tasks for time and expense entry. This is beneficial for assigning all employees in the company to internal projects such as time off or administrative projects. Currently, any new user that is created will have to be manually added to any applicable assignment groups.

OpenAir can use a more streamlined process for assigning newly created users to specified assignment groups. Specific assignment groups can be designated to automatically include any new user that has been created in OpenAir. If a particular assignment group has been flagged, any new user that is created will automatically be added to that assignment group.

This behavior only applies to newly created users and not existing users that have been updated.

To enable this feature, contact OpenAir Customer Support.

Projects Settings **Assignment groups**

**General**

Employees

Other

Cancel **Save**

New

Assignment group

**Employees**

Available

- Adams, Mary
- Admin, Jim
- Carr, Bill
- Carter, Tom
- Collins, Marc
- Davis, Judy
- Doe, John
- Ellis, Ed
- Foster, Tim
- Fox, Rebecca

Selected

Add selected > Add all > < Remove selected < Remove all

**Other**

Notes

☒ Active assignment group

☒ Automatically add new employees to this assignment group

## Customer Contact Information in Project Properties

This feature lets you identify key customer contacts at the project level.

- You can select and edit existing contacts, or add new contacts on the project properties form. When you select an existing contact, the contact information (Name, email, phone number, etc.) appears in the project properties form.
- You can add contact information on projects list views and on tabular (detail) and crosstabbed (summary) reports. The following table lists the supported contact fields:

Active	Address line one	Address line two	Audit trail	Can be a billing contact
Can be a shipping contact	Can be a sold to contact	City	Customer	Customer — business type
Country	Created	Email address	Fax number	First

Internal id	Internal ID — customer_id	Job title	Last	Mobile number
Name	Notes	Phone number	Project status	State/Province
Title	Type	Updated	Zip/Postal code	

To enable this feature, contact OpenAir Customer Support.

**Note:** Contact fields are also available on list views and reports if any of the following settings are enabled for your account:

- Enable shipping contacts (Administration > Application Settings > Invoices > Other settings)
- Enable sold to contacts (internal)

**Altima Technology ERP integration**

Project name \*

Project manager

Project stage

Budget (hours)

**Budget (money)**  
Net revenue

Pass through

Client \*  
**Altima Technology**

Main project contact  

  
Email: [ajones@AltimaTechnology.com](mailto:ajones@AltimaTechnology.com)  
Mobile: 617.322.3388

Start date (MM/DD/YY) \*

Currency

Cost center

## Close a Task for a Specific Employee for Timesheets and Expenses

Restrict named employees from entering or submitting time or expenses against a task.

When enabled, the following boxes are available for each assignment row on the task properties form:

- **Closed for timesheets** — Check this box to prevent the employee assigned to the task from doing either of the following:
  - Entering time against this task – The task is not available for selection when the employee adds a new time entry.

- Submitting a timesheet including time entries against this task – When attempting to submit the timesheet, OpenAir returns an error advising the employee that the task is closed.
- **Closed for expenses** — Check this box to prevent the employee assigned to the task from doing either of the following:
  - Entering expenses against this task – The task is not available for selection when the employee creates a new receipt.
  - Submitting a timesheet including time entries against this task – When attempting to submit the expense reports, OpenAir returns an error advising the employee that the task is closed.

This enables account administrators and users with the necessary role permission to restrict named assignees from entering or submitting time or expenses against the task. This is may be helpful when a project manager does not want assignees to submit time or expenses against the task after their work on the task is completed.

To enable this feature, contact OpenAir Customer Support.



**Important:** Review the following guidelines:

- This feature and the Access All Tasks optional feature are mutually exclusive. If employees can access all tasks and can enter time and expenses against all tasks in projects they have access to, the Close a Task for a Specific Employee for Timesheets and Expenses optional feature cannot be enabled. For more information about the Access All Tasks feature, see [Access All Tasks](#).
- The **Closed for timesheets** or **Closed for expenses** are not available if your OpenAir account is configured to use a scrolling picker to assign employees to tasks.
- Depending on your OpenAir account configuration, the task properties form may include a **Allow all users to log time and expenses to this task** checkbox. If the **Allow all users to log time and expenses to this task** box is checked, checking the **Closed for timesheets** or **Closed for expenses** has no effect – the assignees are still able to enter and submit time or expenses against the task.
- The OpenAir Mobile and OpenAir OffLine add-on services support this feature. To ensure full support, you should check the **Show only clients and projects with open tasks assigned to the employee** box on the Administration > Application Settings > Expenses > Other Settings and Administration > Application Settings > Timesheets > Other Settings.

Assignments				
Assigned to	Assignment profile	Percent of user's time	External ID	<div>Closed for Timesheets</div> <div>Closed for Expenses</div>
Timilty, Patrick		114		<input type="checkbox"/> <input type="checkbox"/>
Select...		100		<input type="checkbox"/> <input type="checkbox"/>
Select...		100		<input type="checkbox"/> <input type="checkbox"/>
[Add rows]				

## Control Editing Submitted Entities by Approvers via Role Permissions

By default, account administrators can control whether approvers can edit submitted items awaiting their approval using the relevant application settings.

With this feature, account administrators can control which approver can edit submitted items awaiting their approval using role permissions.

To enable this feature, contact OpenAir Customer Support.

## Date Filters Support for Incurred Vs. Forecast Revenue Recognition Transactions

Include only the approved time entries, approved expenses and fulfilled purchase items for the specified date range when generating revenue recognition transactions using 'incurred vs. forecast' recognition rules.

You can use this feature, for example, if you run revenue recognitions for the previous month (for example, November) a few days into the current month (for example, December 6) and you only want to include approved time entries, approved expenses and fulfilled purchase items for the previous month (for example, November 1–30) in revenue recognition transactions.

- With this feature enabled, only the approved time entries, approved expenses and fulfilled purchase items entries up to and including the specified end date (for example, November 30) will be included in revenue recognition transactions.
- If the feature is not enabled, revenue recognition transactions include all approved time entries, approved expenses and fulfilled purchase items up to and including the date you run the revenue recognition (for example, December 6). This may include not only approved time entries, approved expenses and fulfilled purchase items for the previous month (for example, November) but also for the current month up to the date you run the revenue recognition (for example, December 6).

To enable this feature, contact OpenAir Customer Support

## Default Options on Task Assignment

Establish default values for task assignment custom fields for new tasks. Easily update any of the default values for some or all project tasks using the task assignment change wizard. This feature saves an enormous amount of time and effort. When default values associated with a user or group are entered, they automatically populate on each task to which the user or group is assigned. In addition, as changes become necessary, they can be made to multiple tasks at one time.

To use this feature, go to Projects > Create new form. Enter the form information and Save it. Then, in the Projects list view, select a project. Select "Task assignment" from the Phases/Task dropdown. Next, enter the default information for each resource or group who will be assigned to a task in the new project, and click Save. Finally, create phases and tasks for the project. The default task assignment custom fields are displayed, and when resources are assigned, the default resource information automatically populate the custom fields.

To enable this feature, contact OpenAir Customer Support.

## Define Charges to Recognize in "As Billed" Revenue Recognition Rules

OpenAir's flexible revenue recognition engine permits companies to recognize revenue based on various criteria. Specifically, the "As billed" revenue recognition rule permits companies to recognize all revenue generated from charges. This feature adds functionality to allow users to configure each as-billed rule to recognize revenue based on the invoiced status of charges as well.

To enable this feature, contact OpenAir Customer Support.

## Estimate to Complete (ETC) and Estimate at Completion (EAC) in Project Budgets

See what impact your planning has on the final project price.

Project / Task / Category / Subcategory	ETC	EAC	Total Cost
▲ Labor	\$ 33,983.60	\$ 479,623.60	\$ 82,864.24
▲ Purchases	\$ 268.05	\$ 268.05	\$ 546.89
▼ 21: Integration ready for production	\$ 33,585.13	\$ 33,585.13	\$ 81,997.37
▲ Expenses	\$ 130.42	\$ 445,770.42	\$ 319.98
▲ Labor	\$ 2,073.26	\$ 6,518.26	\$ 6,179.99
▲ Purchases	\$ 40.00	\$ 40.00	\$ 100.00
▲ 22: Execute training	\$ 2,000.00	\$ 2,000.00	\$ 6,000.00
▲ 23: Integration go-live	\$ 33.26	\$ 4,478.26	\$ 79.99
<b>Total</b>	<b>\$ 36,056.86</b>	<b>\$ 486,562.86</b>	<b>\$ 89,044.23</b>


This feature adds Estimate at Completion (EAC) and Estimate to Complete (ETC) columns to your budgets' total columns in the budget, actuals, and compare screens. When you save changes to your budget, the EAC and ETC fields update to account for the changes.

- **Estimate to Complete** – The Estimate to Complete (ETC) is used for forecasting the funding needed to finish the project at any point. The calculated value includes all planned budget values from the pivot date until the last project budget entry. The pivot date is set in Administration > Application Settings > Projects > Project Budget Options.
- **Estimate at Completion** – The Estimate at Completion (EAC) is used for forecasting the overall cost of the project. The calculated value includes all actual budget values before the pivot date and Estimate to Complete values from the pivot date until the last project budget entry. The pivot date is set in Administration > Application Settings > Projects > Project Budget Options.

ETC and EAC values can also be used in several types of crosstabbed and detail reports. In addition, you can use the **Inception to Date (ITD)** field in reports:

- **Inception to Date** – The Inception to Date (ITD) is the amount of money spent from the beginning of the project until today, or until the pivot date set in Administration > Application Settings > Projects > Project Budget Options.

This feature also allows you to set a baseline budget which is used as the main point of comparison against a project's actual data and other budgets for that project in reporting. A budget with any type of status (open, approved, submitted, archived) can be marked as a baseline.

 **Note:** Each project can only have one baseline budget.

To enable this feature, contact OpenAir Customer Support. This feature also requires the **Project Budgets** feature.

## Exclude Project from Charge Projections

Exclude selected projects from charge and recognition projections.

To use this feature, create a custom field and use the following custom field settings:

- **Add a custom field to** (Associated record type): Project
- **Add a field of this type** (custom field type): Checkbox
- **Field name:** exclude\_from\_projections
- **Display name:** Exclude project from charge and recognition projections

For more information about creating a custom field, see the help topic [Creating and Modifying Custom Fields](#).

After you have created the custom field, to exclude a project from charge or recognition projections:

1. Go to the project properties form (Projects > Projects > *[Select a project]* > Properties).
2. Check the **Exclude project from charge and recognition projections** box.
3. Click **Save**.

To enable this feature, contact OpenAir Customer Support.

## Hide the Project Progress Bar

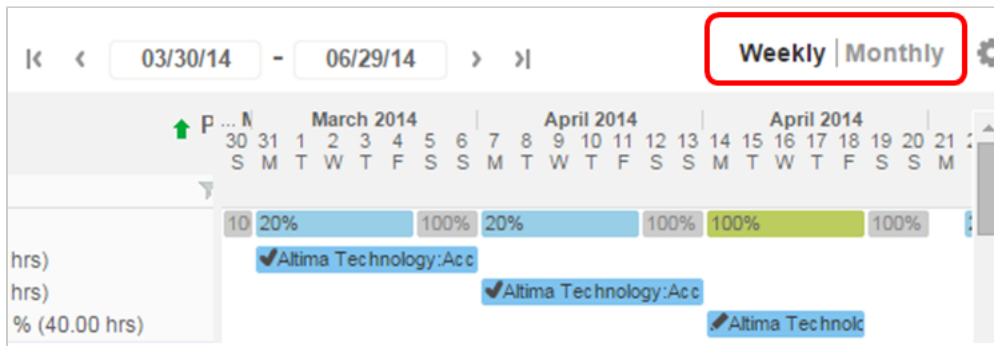
The % complete progress bar can now be hidden in projects for the whole account. This is useful for customers that don't use the % complete metric and calculate project progress in another way.

To enable this feature, contact OpenAir Customer Support.



## Hide the Daily, Weekly, or Monthly Resource Planner Options

Use this option to hide the Daily, Weekly, and Monthly options in the Resource Planner.

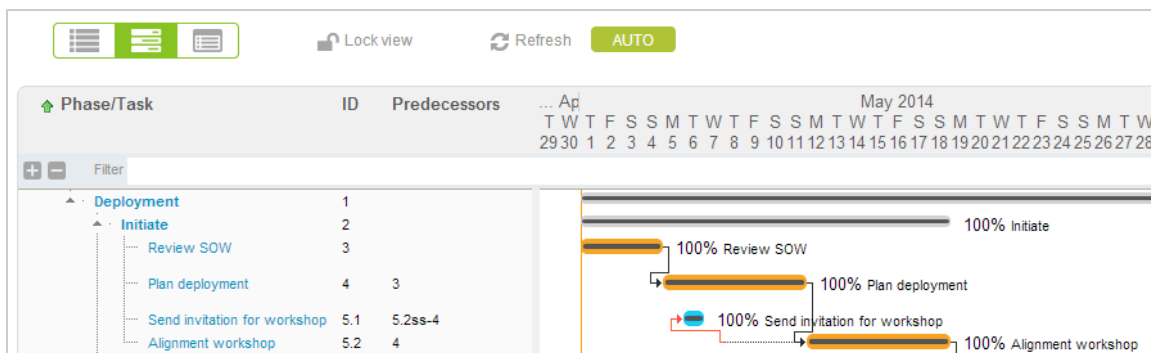


To enable this feature, go to Administration > Application Settings > Resources > Other settings and select any or all of the following options:

- Disable daily option in resource planner.
- Disable weekly option in resource planner.
- Disable monthly option in resource planner.

## Inline Editing, Drag-and-Drop Functionality, and Enhanced Gantt Layout

Reorder tasks by dragging them to new positions or create dependencies from one task to another. Use inline editing to change the task name or predecessor.



For Project Outline view:

- In-line editing of task name, ID, predecessor or start and end dates
- Reorder of task, phase, milestone by dragging to new positions
- Modify order of columns by dragging to new positions

For Gantt view:

- Set dependency by dragging from one task to another
- Drag task to different date or change start or end date
- Outline view and Gantt as one view

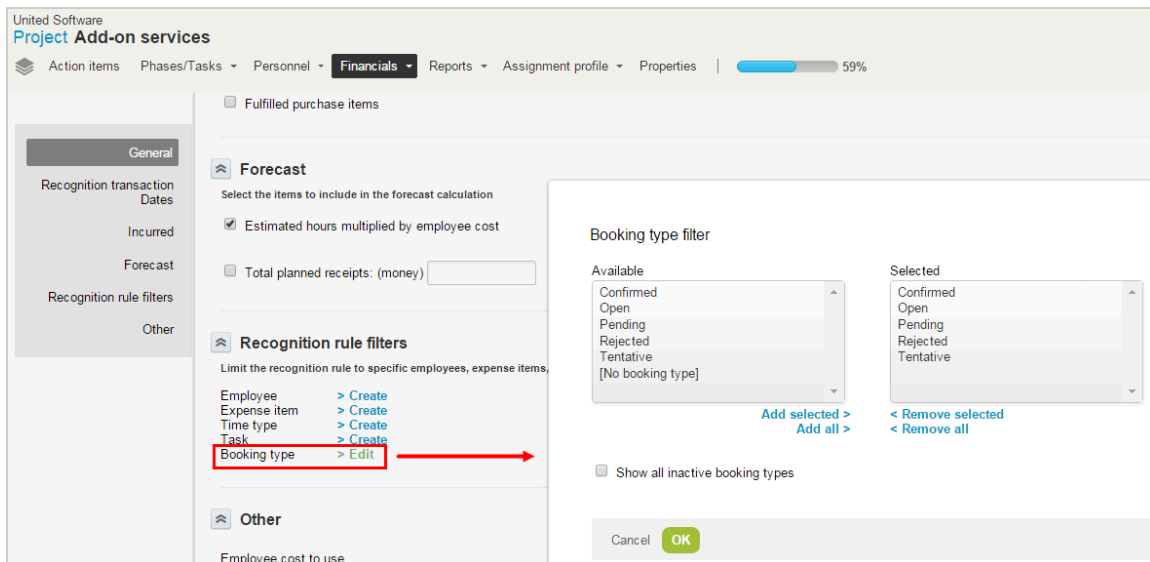
To enable this feature, contact OpenAir Customer Support.

## New “Booking Type” Filter in Revenue Recognition Rule

OpenAir's flexible revenue recognition rules allow companies to recognize revenue on a per-project based on different rules and criteria. The Incurred vs. forecast rule permits revenue to be recognized based on how the project is progressing against the project plan. Revenue is recognized by dividing the incurred costs by the forecasted costs, multiplied by the revenue that is to be recognized. The incurred and forecast costs can include a combination of labor, expenses, bookings, or purchases.

OpenAir has the ability to include a booking type filter leveraging bookings in the forecasted cost calculation. This may be beneficial if the forecast option is configured to use "Approved and booked hours multiplied by user cost" option and would like to exclude bookings that have a booking type of "Tentative" from the calculation.

To enable this feature, contact OpenAir Customer Support.



## One Project Per Expense Report

At times, companies may only want users to enter one project on an expense report for invoicing purposes. In addition to the expense policies options, users now have the ability to restrict an expense report to one project. With this feature enabled, when users create an expense report, the customer:project selection is done at the expense report level. All subsequent receipts created will be associated with that customer:project.

When the project has been selected, the customer:project dropdown will be read-only on the receipt form and locked on the expense worksheet.

**Note:** If the selection for the customer:project is modified at the expense report level after receipts have been entered, all receipts will be changed to the new customer:project. Since a new customer:project is now associated with the receipts, the expense items and task selection will be cleared from the receipts.

To enable this feature, contact OpenAir Customer Support.

## Optionally View and Assign Revenue Hours for Recognition Transactions

Typically, an "As billed" or "Time project billing" recognition rule is created to generate the total revenue amount based on hourly charges. In addition to seeing the total recognized revenue, it is beneficial to view the total recognized hours specifically for transactions generated from hourly charges. This feature adds two enhancements to the revenue recognition functionality which allow users to view and modify revenue hours for recognition transactions.

The ability to display the revenue hours for each recognition transaction has been enabled for all accounts. To disable the display of revenue hours, users with the appropriate role privileges go to Projects > Projects > [select a project] > Financials > Recognition. Select the "As billed" or "Time project billing" rule and clear the **Populate hours in recognition transactions** box. This functionality can be disabled on a per rule basis. At times it may be necessary to create a manual transaction with varying revenue hours or edit an existing system generated transaction. For companies that allow users to manually create revenue recognition transactions, time (in hours and minutes) can be entered for each transaction.

**Note:** Form permissions have been added to the revenue recognition transaction form. Time for existing recognition transactions can also be modified.

To enable this feature, contact OpenAir Customer Support.

## Pagination for the Task Worksheet

Break the task worksheet into separate pages to increase performance and make large amounts of information more manageable.

United Software  
Project Add-on services News Feed

Issues **Phases/Tasks** Personnel Financials Reports Assignment profile Properties 59%

Phases/Tasks: Worksheet Page 1 / 2 | [next](#) > Page 1 1 2

[Cancel](#) [Save](#)

**Task worksheet**

ID	Task name	Part of phase	Percent complete	Closed
3	Review SOW	2: Initiate	100% - complete	<input type="checkbox"/>
4	Plan deployment	2: Initiate	100% - complete	<input type="checkbox"/>
5	Alignment workshop	2: Initiate	100% - complete	<input type="checkbox"/>
7	Identify gaps	6: Analyze	100% - complete	<input type="checkbox"/>
8	Resolve open issues	6: Analyze	100% - complete	<input type="checkbox"/>
9	Define system design	6: Analyze	100% - complete	<input type="checkbox"/>
10	Define data migration plan	6: Analyze	100% - complete	<input type="checkbox"/>
11	Finalize deployment plan	6: Analyze	62%	<input type="checkbox"/>
13	Configure application	12: Configure	100% - complete	<input type="checkbox"/>
14	Conduct initial system review	12: Configure	100% - complete	<input type="checkbox"/>

### To set the number of tasks which appear in a Task Worksheet page:

1. Go to Administration > Application Settings > Projects > Worksheet Display.
2. In the "Number of paginated rows to display" field, enter the number of tasks you want to show on each page. Clear the field to disable this feature.
3. Select "Enable sorting on columns ID and Task name" to allow users to sort these columns alphanumerically in ascending or descending order.
4. Click **Save**.

**Note:** This feature also requires the Task Grid feature. Contact OpenAir Customer Support and request the **Enable the Task Grid Feature** account setting.

## Phase/Task Filter in "Incurred vs. Forecast Rule"

With this feature enabled, the Projects > [select Project] > Financials > [create Incurred vs. forecast rule] form shows Phase/Task instead of Task in the **Recognition rule filters** section.

To enable this feature, contact OpenAir Customer Support.

## Portfolio Projects and Subordinate Projects

This feature lets you:

- Designate projects as portfolio projects — See [Designating a Project as a Portfolio Project](#).
- Create multiple subprojects within a portfolio project — See [Designating a Project as a Subordinate Project Within a Portfolio Project](#).
- Create billing rules that apply to the portfolio project and all subprojects within the portfolio project.
  - By default, all Time, Expense item and Purchase item billing rules created for the portfolio project apply automatically to all subprojects when billing runs for the portfolio project.
  - When creating a billing rule for the portfolio project, you can use the Project filter to apply the billing rule to selected subprojects only.
  - A note appears at the top of the billing rules list view for subprojects if there are any applicable billing rules at the portfolio project level. The note includes a link to the portfolio billing rules list view.
  - The billing transactions list view for the portfolio project shows the billing transactions generated against the portfolio project and all subprojects within the portfolio project. Add the Project column to the billing transactions list view to identify against which project the transaction was generated.

**Note:** A separate optional feature lets you use customer POs to apply a single billing cap across all subprojects or across selected subprojects in a portfolio project. See [Single Billing Cap Across Multiple Subprojects Within a Portfolio Project](#).

- Create recognition rules that apply to all subprojects within the portfolio project.
  - By default, all As billed, Expenses, Purchases, and Time recognition rules created for the portfolio project apply automatically to all subprojects when recognition runs for the portfolio project..
  - A note appears at the top of recognition rules list view for subprojects if there are any applicable recognition rules at the portfolio project level. The note includes a link to the portfolio recognition rules list view.
  - The recognition transactions list view for the portfolio project shows the recognition transactions generated against the portfolio project and all subprojects within the portfolio project. Add the Project column to the recognition transactions list view to identify against which project the transaction was generated.

To enable this feature, contact OpenAir Customer Support.



**Important:** After you designate a project as a portfolio project or subordinate project and transactions are recorded against this project, it is not possible to remove the portfolio or subordinate project designation. You should test this feature extensively on a sandbox account to make sure it meets your business requirements, before you enable the feature and start using it on your production account.

Zibura Technologies Project Zibura Technologies projects				
Action items	Phases/Tasks	Financials	Reports	Assignment profile
0%				
Financials: Recognition: Rules Auto-run Transactions				
Name	Type	Active	Rule	
As billed recognition rule 1	As billed	Yes	Apply to all subordinate projects of this portfolio project Recognize revenue as billed (charges) as USD. Restrict to charges from 02/25/16 to 03/30/17	

## Designating a Project as a Portfolio Project

This feature lets you designate an existing or a new project as a portfolio project.

### To designate a project as a portfolio project:

- Do one of the following:
  - For an existing project, go to Projects > Projects > [Select a project] > Properties.
  - For a new project, click the **Create** button and **Projects > New ...**, enter all the properties for the project.
- Choose **Is portfolio project** under the Portfolio designations section of the project properties form.
- Click **Save**.



**Important:** After you designate a project as a “portfolio” project and transactions are recorded against this project, it is not possible to remove the portfolio project designation.

## Designating a Project as a Subordinate Project Within a Portfolio Project

After you designate a project as a portfolio project for a customer, you can designate multiple projects as subprojects within that portfolio project.



**Tip:** Add the **Portfolio project** column using the list view columns panel to identify subprojects and include a link to the portfolio project associated with each subproject in your project list views.

### To designate a project as a subordinate project:

- Do one of the following:
  - For an existing project, go to Projects > Projects > [Select a project] > Properties.
  - For a new project, click the **Create** button and **Projects > New ...**, enter all the properties for the project, and click **Save**. A new project must be saved first before you can designate it as a subproject.
- Choose **Is a subordinate project of** under the Portfolio designations section of the project properties form and select the relevant portfolio project from the dropdown options.

3. Click **Save**.



**Important:** After you designate a project as a subordinate project and transactions are recorded against this project, it is not possible to remove the subordinate project designation.

## Prevent Invoicing and Revenue Recognition on a Per-Project Basis

Often times, companies may create projects and have users begin work on a project before there is a signed contract. In addition to having users log time and expenses to the project, accurate billing and revenue forecasting is necessary for these types of projects. However, since these projects are considered to be at risk projects, invoicing, revenue recognition transaction, and revenue container creation should be prohibited for these projects.

OpenAir has the ability to designate specific projects that should prevent invoicing and revenue recognition creation. If a project has the option enabled on the project properties form, users will not be able to create invoices, revenue recognition transactions or revenue containers for that project until that option has been disabled. However, billing rules, revenue recognition rules, charge and revenue projections, project billing transactions, and charges can be created for the project.

To enable this feature, contact OpenAir Customer Support.

## Prioritize Recorded Time Over Booked Time for Charge and Revenue Recognition Projection

This feature lets you use recorded or approved time entries exclusively for charge and revenue recognition projection on a given day when time entries exist for that day. The calculation ignores any time booked to any project or task for the same resource on that day.

After you enable this feature, go to Administration > Application Settings > Projects > Charge projections. The charge projections settings show two additional options.

- Approved and booked hours (ignore booked hours if worked or approved hours are logged)
- Worked and booked hours (ignore booked hours if worked or approved hours are logged)

With both options, OpenAir uses booked time to calculate the charge and revenue recognition projection on a given day for a given resource, only if this resource has not recorded any time against any task or project on that same day. If a resource has recorded time entries for that day against any task or project, only the approved or recorded time will be used for charge and revenue recognition projection. If the resource is booked to any other projects or tasks on the same day but has not recorded time entries against these other tasks or projects, the booked time will be ignored.

To enable this feature, contact OpenAir Customer Support.

## Project Assignment Profiles

The Project Assignment Profiles feature lets project managers define the required skill sets for project and task assignments. These skill sets can be used to find and book the appropriate resources to the project or task.

To create a Project Assignment Profile, create a project plan, with associated tasks, then go to the Assignment profile tab on the project record, create a new assignment profile and add all skills required. You can then use the assignment profile to replace a generic resource with a qualified resource.

Type	Name	Attribute	Comment
Job role	PM	Primary	
Tech skill	JavaScript	Expert	

2 rows

If the Automated Search Engine for Booking Creation optional feature is enabled for your account, you can also select the **Project assignment profile** appears on the following views:

- New multiple bookings form — Click the Create button then click **New, multiple** under Bookings to access the form.
- Booking worksheet (classic and dynamic) — Go to Resources > Bookings > Worksheet to access the worksheet.

To enable this feature, contact OpenAir Customer Support.

## Project Budget

Stay on top of your project finances with the Project Budget optional feature. The feature lets you set a budget for labor, expenses, and purchases, and track expenditure either at the project or task level.

- You can compare up to five submitted budgets side-by-side and approve the most realistic scenario. View totals as well as monthly, quarterly, category-level, and task-level details.
- You can keep different versions of the same budget.
- You can submit multiple budgets for approval. Approving a budget automatically rejects the others and lets the submitter know which was approved.
- You can define your own color codes ranges to identify whether budget items are on or off target, based on the percentage of planned versus actual expenditure.

For more information about configuring and using the Project Budget feature, see [Administrator Guide](#).





**Important:** The previously existing Project Budget feature has been renamed “Transactional Budget”. You can change the account term for “Transactional Budget” in Administration > Global settings > Display > Interface: Terminology.

To enable this feature, contact OpenAir Customer Support.

Budget | Actuals

Planned

\$30 000,00

Change

\$0,00

Current Total

\$86 750,00

Balance

\$-56 750,00

New Total

\$86 750,00

Period

Monthly

View

Tasks

Units

Money

☐ Rounded
 ☐ Manual save

2015

Total budget

Jan

Feb

Mar

Apr

+

-

Filter

▼ 1: Introduction phase

\$ 86 750,00

\$ 17 500,00

\$ 17 850,00

\$ 19 000,00

\$ 16 750,00

▼ 2: Kickoff meeting

\$ 85 700,00

\$ 17 500,00

\$ 16 800,00

\$ 19 000,00

\$ 16 750,00

Add new

▼ Expenses

\$ 20 700,00

\$ 4 500,00

\$ 3 800,00

\$ 6 000,00

\$ 3 750,00

✕ Airfare

\$ 11 500,00

\$ 1 800,00

\$ 1 800,00

\$ 3 600,00

\$ 1 800,00

✕ Car Rental

\$ 1 150,00

\$ 400,00

\$ 0,00

\$ 600,00

\$ 0,00

✕ Ground transit

\$ 0,00

\$ 0,00

\$ 0,00

\$ 0,00

\$ 0,00

✕ Hotel

\$ 8 050,00

\$ 2 300,00

\$ 2 000,00

\$ 1 800,00

\$ 1 950,00

✕ Miscellaneous

\$ 0,00

\$ 0,00

\$ 0,00

\$ 0,00

\$ 0,00

▼ Labor

\$ 65 000,00

\$ 13 000,00

\$ 13 000,00

\$ 13 000,00

\$ 13 000,00

✕ Business Analysis

\$ 65 000,00

\$ 13 000,00

\$ 13 000,00

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▼ Purchases

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## Project Center

The Project Center optional feature aims to provide you with the tools to manage key project activities from a single screen.

The Project Center lets you:

- Create and modify your project plans — See the help topic [Managing Project Plans in the Project Center](#).
- Create and manage resource bookings from within the project center — See the help topic [Managing Resource Bookings in the Project Center](#).
- Track hours worked in past periods and view the planned resource costs and time charges — [Viewing Hours, Time Costs, or Time Charges in the Project Center](#)

Account administrators control who can access the project center by role permission.

Account administrators control project center options for all OpenAir account users, including whether the project center show project sequence information only or project sequence information and resource booking information. See the help topic [Project Center Options](#).

To access the project center for a specific project, go to Projects > Projects > [Select a project] > Project Center.

←

Project Project Center implementation

Client: Altima Technology

DASHBOARD

PROJECT CENTER

ISSUES

MORE +

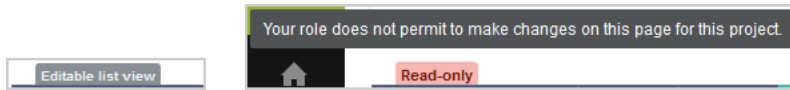
Project status:  
NOT STARTED

Project progress:  
0%

5

MC

The project center view looks similar to a list view and supports several list view features including inline-editing. A label above the column headers indicates whether the project center view is editable or read-only, depending on the access control settings for the project you are viewing and your permissions. For more information about inline-editing, see the help topic [Inline-Editing in List Views](#).



**Note:** Depending on your role, you may not be able to edit all information in the project center view even if the view itself is editable.

Form permissions and form rules are applied. Form scripts associated with the booking form will be triggered when updating a booking record directly from the project center.

The project center includes the following components:

1	<p><b>Toolbar</b> — The project center toolbar includes the column selection and download tools available for list views throughout OpenAir as well as functionality specific to the project center view. See the help topic <a href="#">Project Center Toolbar</a>.</p>
2	<p><b>Project outline</b> — The project outline occupies only the left section of the canvas and shows your project sequence and, depending on the project center options configured for your account, resources booked to your project.</p> <ul style="list-style-type: none"> <li>You can create and modify your project plans.</li> <li>You can add phases, tasks and milestones to your project and modify the project sequence.</li> <li>You can view, enter or update information about the phases, tasks and milestones in your project using inline-editing.</li> <li>You can set task and phase dependencies.</li> <li>You can choose the columns shown in the project outline. The first time you visit the project center, the project outline includes the following columns: Actions, Task, Start, Finish, Hours — Booked. Only the Actions and Task columns are required, all others are optional. You can include columns corresponding to standard and custom fields for task records (phases, tasks and milestones) and booking records. You can save the configuration in the same way as for list views. See the help topics <a href="#">Selecting List View Columns</a> and <a href="#">Saving and Using Custom List View Configurations</a>.</li> <li>Add resource bookings at the task level or at the project level. You can change the resources booked directly from the project center view. (Available only if project center options are set to show resource booking information)</li> <li>View, enter, or update resource booking information using inline-editing. (Available only if project center options are set to show resource booking information)</li> <li>Add built-in and custom fields for the booking entity as columns to the project outline.</li> </ul> <p>Relationship lines show a clear overview of the project structure and relationships between phases, tasks, bookings and milestones in the project. You can expand and collapse each node in the project tree to show or hide all phases, tasks, bookings, and milestones nested under that node.</p> <p>The project schedule information (calculated task, phase and project <b>Start</b> dates and <b>Finish</b> dates, and <b>Planned hours</b>) is updated automatically when you make a relevant change in the project center. When the calculation is in progress, information in the <b>Start</b>, <b>Finish</b> and <b>Planned hours</b> columns cannot be edited and loading spinners are visible in the column headers. See the help topic <a href="#">Project Schedule Calculation in the Project Center</a>.</p>
3	<p><b>Booking grid</b> — The Project Center view shows a booking grid alongside the project outline. Depending on the selected granularity, the booking grid shows a week-by-week or month-by-month schedule. Each column corresponds to a week or month and the column header shows the first day of the week or month. See the help topic <a href="#">Date Navigation in the Project Center</a>. The number of columns in the grid depends on the size of your browser window. It is calculated automatically when you first load the screen or when you refresh it.</p>

- You can use the booking grid to enter the number of hours you want to book a resource for a given task (or at the project level) in a given week or month. You can copy multiple cell values using the copy and paste or fill handle functionality.
- You can use the date navigation panel in the toolbar to change the period shown in the booking grid.
- You can use the measure selector in the toolbar to switch between viewing hours, time costs or time charges in the booking grid. See the help topic [Viewing Hours, Time Costs, or Time Charges in the Project Center](#).

Horizontal bars in the booking grid give a visual representation of the duration of the project, each phase and task based on the **Start** and **Finish** dates. Each bar is located at the top of the row and is color-coded: green color for the project, dark gray color for each phase, light gray color for each task.

Availability indicators show the availability of the resource for each week as you make changes, and warning indicators show out of schedule bookings and potential overutilization of resources.

**Important:** Review the following guidelines:



- The booking grid is available only if project center options are set to show resource booking information – See the help topic [Project Center Options](#).
- By default, the calculated task, phase and project **Start** dates and **Finish** dates, **Planned hours** and **% Complete** are calculated based on assignments and not on bookings. To base the calculation on bookings instead of assignments for a project, see the help topic [Basing Project Schedule Calculation on Bookings for a Project](#).
- The project center does not currently support booking approvals — You cannot submit bookings for approval, approve or reject bookings using the project center.

Project CRM integration | Client: Altima Technology

Project Center | Action Items | Phases/Tasks | Personnel | Financials | Reports | Assignment Profile | Properties

Project progress: 1% 1

12/14/22 12/15/22 12/16/22 01/01/23 01/02/23 01/03/23 01/04/23 01/05/23 01/06/23 01/07/23 01/08/23 01/09/23 01/10/23 01/11/23 01/12/23 01/13/23 01/14/23 01/15/23 01/16/23 01/17/23 01/18/23 01/19/23 01/20/23 01/21/23 01/22/23 01/23/23 01/24/23 01/25/23 01/26/23 01/27/23 01/28/23 01/29/23 01/30/23 01/31/23 02/01/23 02/02/23 02/03/23 02/04/23 02/05/23 02/06/23 02/07/23 02/08/23 02/09/23 02/10/23 02/11/23 02/12/23 02/13/23 02/14/23 02/15/23 02/16/23 02/17/23 02/18/23 02/19/23 02/20/23 02/21/23 02/22/23 02/23/23 02/24/23 02/25/23 02/26/23 02/27/23 02/28/23 02/29/23 02/30/23 03/01/23 03/02/23 03/03/23 03/04/23 03/05/23 03/06/23 03/07/23 03/08/23 03/09/23 03/10/23 03/11/23 03/12/23 03/13/23 03/14/23 03/15/23 03/16/23 03/17/23 03/18/23 03/19/23 03/20/23 03/21/23 03/22/23 03/23/23 03/24/23 03/25/23 03/26/23 03/27/23 03/28/23 03/29/23 03/30/23 03/31/23 04/01/23 04/02/23 04/03/23 04/04/23 04/05/23 04/06/23 04/07/23 04/08/23 04/09/23 04/10/23 04/11/23 04/12/23 04/13/23 04/14/23 04/15/23 04/16/23 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04/26/26 04/27/26 04/28/26 04/29/26 04/30/26 05/01/26 05/02/26 05/03/26 05/04/26 05/05/26 05/06/26 05/07/26 05/08/26 05/09/26 05/10/26 05/11/26 05/12/26 05/13/26 05/14/26 05/15/26 05/16/26 05/17/26 05/18/26 05/19/26 05/20/26 05/21/26 05/22/26 05/23/26 05/24/26 05/25/26 05/26/26 05/27/26 05/28/26 05/29/26 05/30/26 05/31/26 06/01/26 06/02/26 06/03/26 06/04/26 06/05/26 06/06/26 06/07/26 06/08/26 06/09/26 06/10/26 06/11/26 06/12/26 06/13/26 06/14/26 06/15/26 06/16/26 06/17/26 06/18/26 06/19/26 06/20/26 06/21/26 06/22/26 06/23/26 06/24/26 06/25/26 06/26/26 06/27/26 06/28/26 06/29/26 06/30/26 07/01/26 07/02/26

**Note:** The following list view functionality is not available in the project center:

- Filtering and sorting options — The project center screen is designed to show the full project outline and all resource bookings in the project sequence.
- Rows per page — You can collapse and expand nodes in the project trees to show or hide phase, task, booking and milestone rows nested under the node. This functionality would not be supported with a limited number of rows per page.
- Column lock — The project center uses a fixed column lock to separate the project outline and the booking grid in the same view.
- Bulk actions — Not currently supported.

To enable this feature, contact OpenAir Customer Support. The Project Center feature requires the [Inline-Editing in List Views](#) feature to be enabled.


**Important:** Test the project center feature extensively on a sandbox account or during release preview before you enable it on your production account.

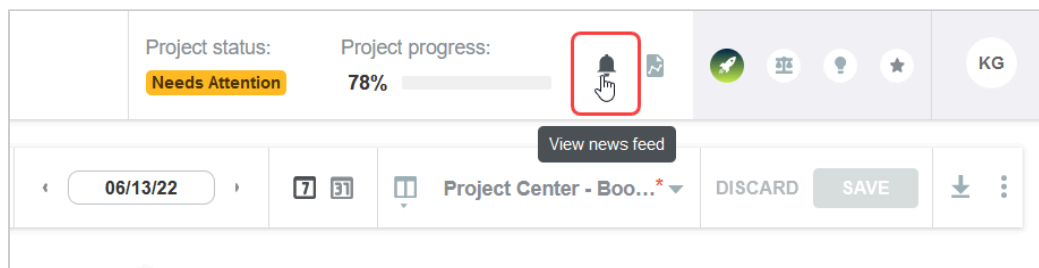
- Note the following difference of behavior:
  - If you add a booking in the project center, a separate booking record is created for each week you book the resource.
  - If you create a booking using the entity properties form, you can create a single booking record for any length of time.

## Project Status News Feed

Add, update, and display project status messages to keep project stakeholders informed.

When this feature is enabled:

- Project record headers and project QuickViews show a news feed icon . Click this icon to open the project status news feed, where you can add status updates to your project or read existing updates.



- You can add the **News feed — Status** column to your list views.
  - The **News feed — Status** column shows the project status as a color coded text badge, if there are any status updates for the project and if a project status is set in the latest status update.

- Click the status to open the project status news feed from the projects list view and view the latest status update details. You can sort and filter your data by status using the list view sort and filtering options.

Project	News feed	Project stage
All	Status	All
<a href="#">Project Center implementation</a>	NOT STARTED	Active
<a href="#">Data Migration</a>	NEEDS ATTENTION	Active
<a href="#">ERP Deployment</a>	COMPLETED	Active
<a href="#">Pegasus</a>	ON HOLD	Active
<a href="#">Hardware implementation</a>	ON TRACK	Active
<a href="#">OAuth2 Support for all Integrations</a>		Active
<a href="#">Hardware Implementation</a>	PROPOSED	Active

**Note:** The **News feed — Status** column is currently only available on redesigned list views if the Project Status News Feed feature is enabled for your account.

The project status is not currently supported in:

- Project status summary
- Reports
- Dashboard portlets
- List views other than redesigned list views.

Each status update shows a date and time stamp and the name of the person who created it.

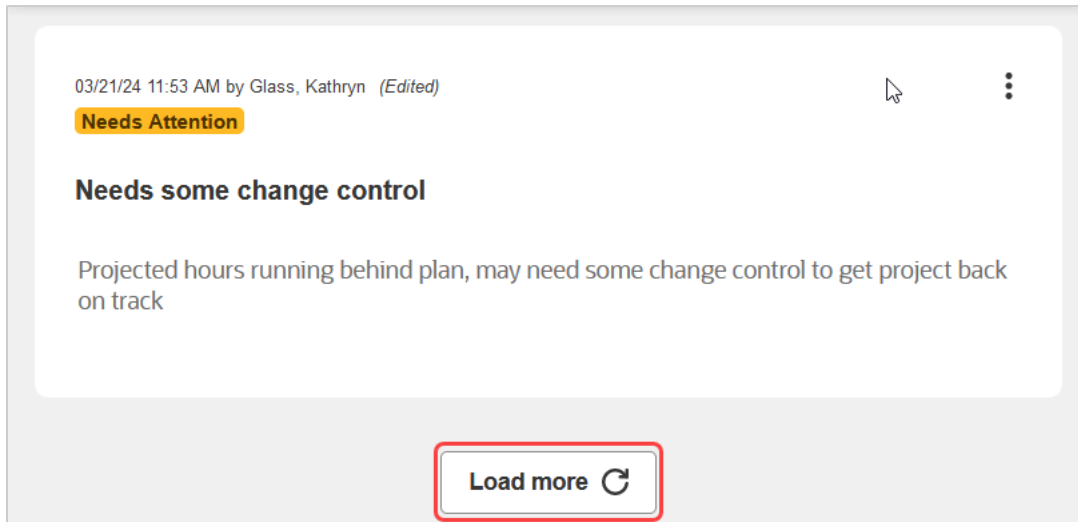
03/11/24 10:32 AM by Glass, Kathryn (Edited)

**Needs Attention**

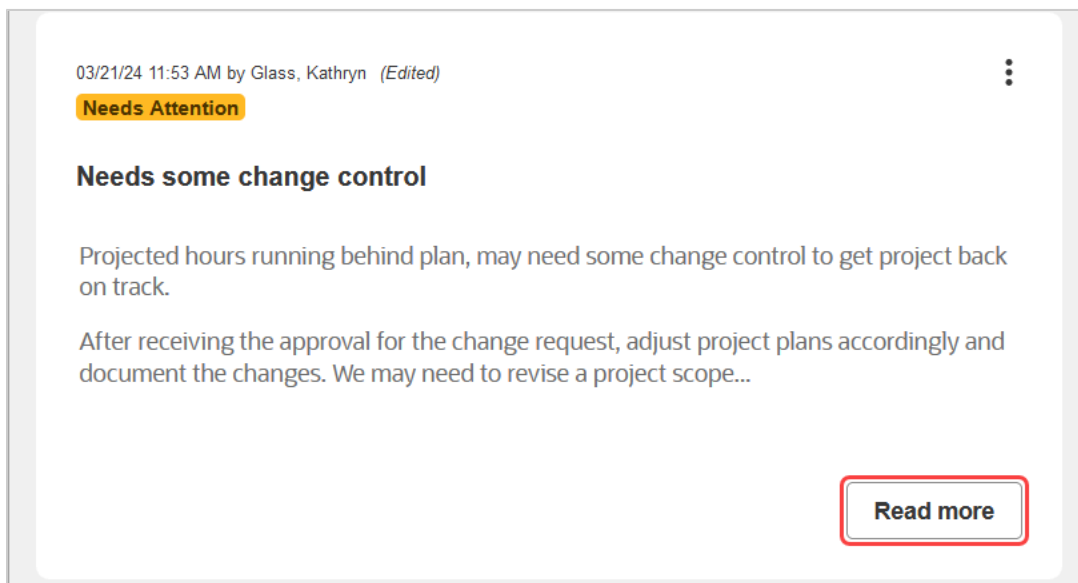
**Need some change control**

Projected hours running behind plan, may need some change control to get project back on track

By default, the news feed displays 5 status updates when opened. Click **Load more** to load additional messages.



You can scroll through the news feed when there are more status updates than the page can fit. Long status updates are not shown in full. Click **Read more** to see all the text.




Status updates can be edited. Edited status updates show the mention *(Edited)* in the upper right corner. Point to *(Edited)* to see when and by whom the status update was edited.



To close the project status news feed, click anywhere outside of it.

Account administrators can control who can view or modify the project status news feed using the following role permissions:

- **View project news feed on any project** – Users with this role can see the project status news feed, but cannot edit it.
- **View and modify project status news feed on any project** – Users with this role can see the project status news feed and add, edit, or delete messages in it.

 **Note:** Project owners can add, view, modify or delete news feed messages for the projects they own even if they do not have this permission.

To enable this feature, contact OpenAir Customer Support.

## Restrict Project Recalculation to Tasks Impacted by the Changes on the Project Outline, Gantt and Task Detail View


Improve the performance of the project outline, Gantt and task detail view by restricting project recalculation to tasks that are impacted by the changes.

By default, when you create, duplicate, delete, or modify a task associated with the project you are viewing, or when you move or copy a task to another project, the project calculation includes all tasks associated with the project.

With this feature enabled, only the tasks that are impacted by the changes are include in the project calculation. For example, if you change the planned hours for a resource assigned to a particular task, the recalculation will include only the specific task and any successor tasks. None of the other tasks are included in the recalculation.

The optimization improves loading time for the following views after making changes or after running the project recalculation manually.

- Projects > [Select a project] > Phases/Tasks > List.
- Projects > [Select a project] > Phases/Tasks > Outline — Create, delete, duplicate, copy, move, repeat tasks.
- Projects > [Select a project] > Phases/Tasks > Gantt — Create, delete, duplicate, copy, move, repeat tasks.

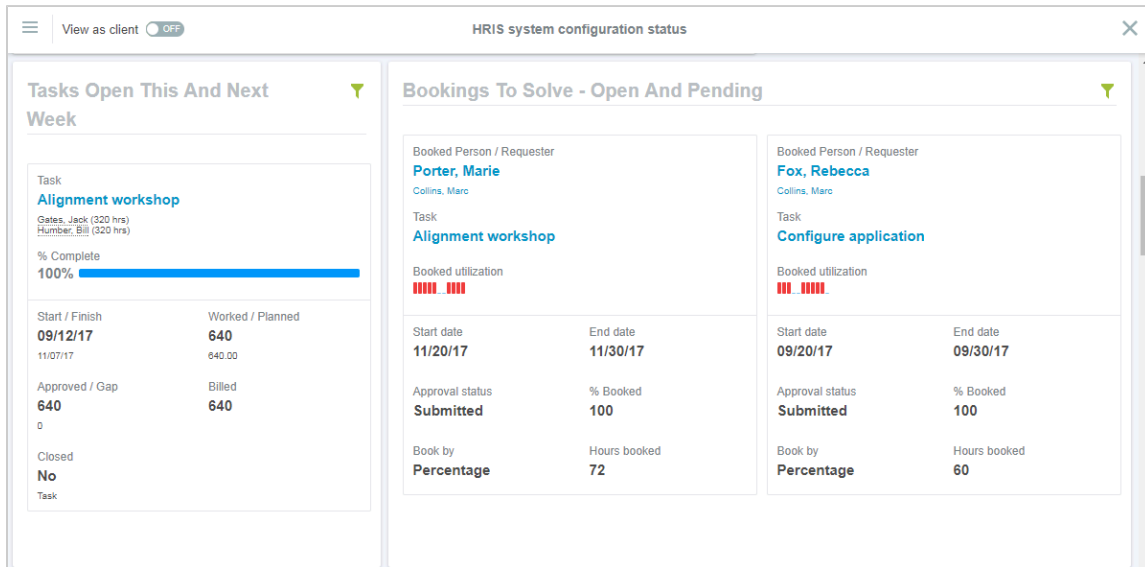
This optional feature can be used in combination with other project recalculation optimization features. For more information, see  [Performance Tuning](#).

To enable this feature, contact OpenAir Customer Support.

## Project Status Summaries (PSS)

Produce an easy-to-read project status page summarizing important project progress data. The Project Status Summary is customizable, and can be populated with information critical to your company internally or your customers externally.

To enable this feature, contact OpenAir Customer Support.



Each Project Status report can contain a header with basic information about the project. The default project header can be modified or deleted.

Below the header, you can add a series of customizable portlets which show information about tasks, task assignments, bookings, and other project- and task-related information. The portlets can be moved, edited, and deleted in the PSS' "Edit" mode. The description of portlets can be edited, and individual portlets can be configured to be visible or hidden to customers.

Dynamic portlets such as the Bookings portlet also allow you to set primary, secondary, and tertiary sorting criteria or filters for the individual information cards which they display.

Project Status Summaries can be printed or converted to a PDF document.

To enable this feature, contact OpenAir Customer Support and ask them to enable the Project Status Summaries feature. After you enable this feature, you need to assign View or Edit permissions to your roles. The available role settings are:

- View Project status page
- View and modify Project status page

## Select Different Currencies for Loaded Cost Overrides

OpenAir's flexible costing capabilities enables companies to accurately report on a project's profitability based on a user's loaded cost value. Because a user's cost value may vary based on the project or task being worked on, loaded cost overrides can be established at the project or task level. Currently, when overriding the cost at the project or task level, the currency of the cost value is driven by the project's currency. At times, it may be beneficial for the currency of the user's cost value override to be different than the project's currency.

OpenAir has the ability to override the currency value for loaded cost overrides at the project and task levels. This permits more accurate profitability reporting based on the loaded cost currency on a per-project or per-task basis. The default setting for the currency value is set to "[Use Project Currency]" unless modified to a different selection. However, please note that if the project's currency changes, it does not dynamically update the currency value to the project's new currency.



To enable this feature, contact OpenAir Customer Support.

United Software  
Project Add-on services

Action items Phases/Tasks Personnel Financials Reports Assignment profile Properties 59%

**Loaded hourly cost**  
You can override the resource loaded hourly cost for this project

Resource	Primary loaded cost	Primary loaded cost currency	Secondary loaded cost	Secondary loaded cost currency	Tertiary loaded cost	Tertiary loaded cost currency
Carr, Bill	40.00	USD		GBP		GBP
Select...		GBP		GBP		GBP
Select...		GBP		GBP		GBP

[Add rows]

## Set Preferred Landing Page for Projects

This feature sets the landing page within each project, for example, on the Task List. It can be set at a User level or for your whole company.

**Page Layout**

- Dashboard Options
- Timesheet Options
- Expenses Options
- Projects Options**
- Display Options

**Projects Options**

Preferred landing page for projects

- No preference
- Properties
- Outline view
- Gantt view
- Task list**
- Task worksheet
- Message board
- Billing
- Recognition

To set this feature for a user, go to User Center > Personal Settings > Project Options.

To set this feature for your company, go to Administration > Application Settings > Projects > Other Settings > Preferred landing page for projects.

To enable this feature, contact OpenAir Customer Support.

## Show Billing Rules on Revenue Recognition Forms

Link billing rules to revenue recognition rules.

This feature allows you to choose which revenue recognition rule forms display a billing rule pick list. When you select a billing rule from this field, the billing rule is linked to the revenue recognition rule. This setting does not affect when billing or revenue recognition rules are run. Billing Rule IDs on revenue recognition rules can be accessed using the XML or SOAP APIs.

To enable this feature, contact OpenAir Customer Support.

## Single Billing Cap Across Multiple Subprojects Within a Portfolio Project

This feature lets you use customer POs to apply a single billing cap across all subprojects or across selected subprojects in a portfolio project — You can use the customer PO total, specified either in hours or as a monetary amount, as the billing cap.

You can read or modify the `cap_by_customerpo` field in the `project_billing_rule` table using the XML API and SOAP API, and the `cap_by_customerpo` attribute is also listed in the Scripting Center SOAP Explorer.

The following conditions must be met to modify `cap_by_customerpo`:

- The project associated to the project billing rule is a portfolio project. .
- The project associated to the project billing rule is associated with at least one customer PO.
- The billing rule is associated with a customer PO.
- The billing rule type is one of the following: Expense item, Purchase item, Time.

To enable this feature, contact OpenAir Customer Support.



**Important:** This feature requires the Portfolio Projects and Subprojects feature to be enabled for your account. See also [Portfolio Projects and Subordinate Projects](#).

## Using a Customer PO as a Billing Rule Cap

You can use customer POs to apply a single billing cap across all subprojects, or across selected subprojects in a portfolio project. You can use the customer PO total, specified either in hours or as a monetary amount, as the billing cap.



**Note:** Review the following guidelines:

- A customer PO can only be used as a billing rule cap for one portfolio project at any time.
- You can go to Projects > Projects > *[Select a project]* > Financials > Customer POs to view or modify Customer POs associated with the selected project .

### To use a customer PO as a billing rule cap:

1. Go to Administration > Application Settings > Invoices > Customer POs to view the list of customer POs.
2. Do one of the following:
  - Select a customer PO.
  - Create a new customer PO — To do so, click the **Create** button, then **New > Customer PO**.
3. Enter the total **Amount (money)** (and **Currency**, if applicable) or the total **Amount (hours)** for the customer PO. It is not possible to enter values for both the **Amount (money)** and **Amount (hours)** fields.
4. Enter any additional details for the Customer PO and click **Save**
5. Go to Projects > Projects > *[Select a portfolio project]* > Properties.
6. Under the General section of the project properties form, next to Customer POs, click **Create** or **Edit** and make sure the relevant Customer PO is selected.
7. Go to Financials > Billing > Rules.
8. Do one of the following:
  - Select an existing Time, Expense item, or Purchase item billing rule.
  - Click the **Create** button and **Time billing rule**, **Expense item billing rule**, or **Purchase item billing rule**.

9. Under the Other section of the billing rule form, select a **Customer PO**.
10. Under the Rule cap section of the billing rule form:
  - Check the **Use customer PO cap** box. The **Cap (money)** or **Cap (hours)** will be populated automatically using the Customer PO **Amount (money)** or **Amount (hours)** value when you save the form.
  - (Optional) Check the **Adjust ... to fit under the cap** box.
  - (Optional) Check the **Do not bill ... that exceed the cap** box.
11. Click **Save**.

## Task on Purchase Requests

This feature lets you select a project task on purchase request or purchase item records. When enabled, the **Task** column can be added to purchase request and purchase item list views and detailed reports.

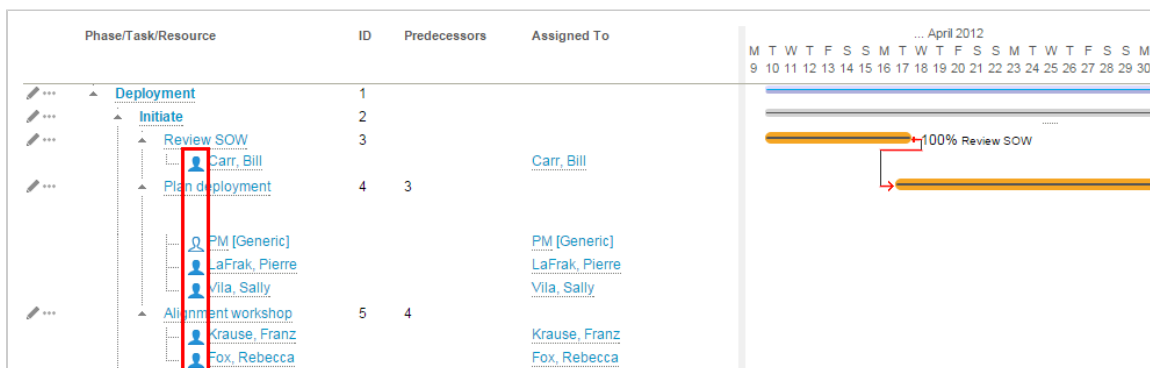
To enable this feature, contact OpenAir Customer Support.

## User-Level Outline View

The User-Level Outline View feature enabled adds details about assignments in the Outline and Gantt view:

- A row is added for each resources assigned to the task under each task instead of a summary of resources assigned in the **Assigned to** column.
- Icons provide a visual indication of active and inactive resources, generic resources and assignment groups.

To enable this feature, contact OpenAir Customer Support.



To enable this feature, contact OpenAir Customer Support.

## View Tasks for Inactive Projects in Task List View

Managers often leverage the project task list view to manage tasks. At times, there may be a need to view information for tasks that are associated with an inactive project. Without this feature, only tasks associated with active projects are displayed in the task list view. When this feature is enabled, a new column is added to the task list to allow users to filter on tasks associated with an active or inactive

project. To add the project status, users with the appropriate role privileges go to Projects > Tasks > Pending/Completed/All tasks and click on the **Customize list view** link on the upper left corner of the top menu bar. Click **Project active** and select **Add selected items**. Click **OK**.

To enable this feature, contact OpenAir Customer Support.

# Resources

The following optional Resources features are available in OpenAir. Some features require OpenAir Customer Support to enable them for you.

- [Additional Booking Specific Approvers](#)
- [Add Multiple Profiles](#)
- [Advanced Booking Worksheet](#)
- [Auto-Create Bookings for Generic Resources](#)
- [Booking Assignment Date Filters](#)
- [Bulk Booking Editor](#)
- [Bulk Delete Action Respects Booking Rules](#)
- [Consolidated Resource Profiles](#)
- [Customized User Avatars](#)
- [Decouple RDR Header and RRQ Booking Type](#)
- [Detailed Booking Groupings in the Advanced Booking Worksheet](#)
- [Disable New, Multiple Bookings Option](#)
- [Display More Bookings in Advanced Booking Worksheet](#)
- [Enable a Booking Type to Exist in All Approval Statuses](#)
- [Enable Bookings to be Auto-Approved](#)
- [Optional Booking on Approved Booking Requests](#)
- ["Require Job Code" Setting for Dynamic and Advanced Booking Worksheets](#)
- [Resource Booking Approvals](#)
- [Resource Demand Request](#)
- [Resource Demand Request Queues Cannot be Finalized If Availability is Zero](#)
- [Resource Planner](#)
- [Resource Profile Type Access Control](#)
- [Restrict Utilization Recalculation to Resources Impacted by the Changes on the Advanced Booking Worksheet](#)
- [Show Project Assignment Profiles on Task Assignments](#)
- [Skills Approvals](#)
- [Use Booking Request Grid to Enter Multiple Requests That Are Available](#)
- [View Advanced Resource Search Role Permission](#)

## Additional Booking Specific Approvers

This feature lets you specify up to three specific approvers for a booking and to bring extra flexibility to the booking approval process.

If you have RDR enabled this feature will also enable up to three specific approvers on a resource request.

You can also then use the meta-entity value (e.g. [Booking approver 1]) in approval processes.

To enable this feature, contact OpenAir Customer Support.

## Add Multiple Profiles

With this feature you can add multiple profiles to a resource profile at the same time. Type part of a profile name and a list of matching profiles displays, then select one or more profiles to add to the profile.



**Important:** The Add Multiple Profiles feature is no longer supported. Enable the Consolidated Resource Profiles, which offers similar functionality, instead. See [Consolidated Resource Profiles](#).

## Advanced Booking Worksheet

Use a more streamlined, detailed, and visually-appealing worksheet to create and manage your bookings.

Open Submitted Approved Rejected All Worksheet Chart Planner										
ADD RESOURCE %				0 FILTERS		K < 06/07/21 - 07/12/21 > X		DISCARD	SAVE & SUBMIT	SAVE
Resource	Booking type	Approval Status	Bookings	Week starting 06/07/21	Week starting 06/14/21	Week starting 06/21/21	Week starting 06/28/21	Week starting 07/05/21	Week starting 07/12/21	Total
<b>Carr, Bill</b>			1 booking	0.00 hrs	0.00 hrs	37.50 hrs	37.50 hrs	0.00 hrs	0.00 hrs	75.00 hrs
Foster Software : ERP implementation	Pending	Submitted	1 booking	0.00	0.00	37.50	37.50	0.00	0.00	75.00 hrs
<b>Collins, Marc</b>			4 bookings	32.00 hrs	32.00 hrs	40.00 hrs	40.00 hrs	32.00 hrs	32.00 hrs	208.00 hrs
Altima Technology : CRM integration	Tentative	Approved	1 booking	0.00	0.00	8.00	8.00	0.00	0.00	16.00 hrs
Honeycomb Services : General administration	Confirmed	Approved	1 booking	0.00	0.00	0.00	0.00	32.00	32.00	64.00 hrs
Webb Inc. : PSA module deployment	Confirmed	Approved	1 booking	32.00	32.00	0.00	0.00	0.00	0.00	64.00 hrs
Webb Inc. : PSA module deployment	Tentative	Approved	1 booking	0.00	0.00	32.00	32.00	0.00	0.00	64.00 hrs
<b>Consultant [Generic]</b>			4 bookings	40.00 hrs	40.00 hrs	32.00 hrs	32.00 hrs	40.00 hrs	40.00 hrs	224.00 hrs
Altima Technology : CRM integration	Pending	Submitted	1 booking	0.00	0.00	16.00	16.00	0.00	0.00	32.00 hrs
Altima Technology : CRM integration	Pending	Submitted	1 booking	0.00	0.00	16.00	16.00	0.00	0.00	32.00 hrs
Altima Technology : CRM integration	Tentative	Approved	2 bookings	40.00	40.00	0.00	0.00	40.00	40.00	160.00 hrs
<b>Davis, Judy</b>			3 bookings	40.00 hrs	40.00 hrs	8.00 hrs	8.00 hrs	24.00 hrs	24.00 hrs	144.00 hrs
Webb Inc. : PSA module deployment	Tentative	Approved	1 booking	40.00	40.00	8.00	8.00	24.00	24.00	144.00 hrs
<b>PM [Generic]</b>			4 bookings	32.00 hrs	32.00 hrs	48.00 hrs	48.00 hrs	30.00 hrs	30.00 hrs	220.00 hrs
Altima Technology : CRM integration	Open	Open	1 booking	0.00	0.00	10.00	10.00	0.00	0.00	20.00 hrs
Altima Technology : CRM integration	Tentative	Approved	2 bookings	32.00	32.00	38.00	38.00	30.00	30.00	200.00 hrs
<b>Porter, Marie</b>			3 bookings	32.00 hrs	32.00 hrs	32.00 hrs	32.00 hrs	40.00 hrs	40.00 hrs	208.00 hrs
Webb Inc. : PSA module deployment	Tentative	Approved	2 bookings	32.00	32.00	32.00	32.00	40.00	40.00	208.00 hrs
<b>Total</b>				280.00 hrs	287.33 hrs	350.17 hrs	362.30 hrs	225.20 hrs	222.00 hrs	1,727.00 hrs

A new and improved version of the Resource Booking Worksheet is now available to help you create and manage bookings more efficiently than ever. The new Worksheet has the following features:

- Bookings appear under each resource.
- See resource utilization at a glance. Green, yellow, and red color-coded cells highlight underutilized, fully utilized, and overutilized resources.
- Point to a resource's name to open a resource QuickView.
- Display and edit booking information in daily, weekly, monthly, or many other more time periods.
- Drill down to greater levels of detail.
- Filter the worksheet by department, job code, project, or skills.
- Column and row totals showing total number of hours or percentages across all visible resources and all visible time periods.
- Resource utilization subtotals showing total number of hours or percentages for both the filtered set and all resource bookings when filters are applied.

The Advanced Booking Worksheet requires the Resource Planner feature, and also requires the following role permissions for roles which will use the worksheet:

- View and modify bookings
- View resource planner

To enable this feature, contact OpenAir Customer Support.

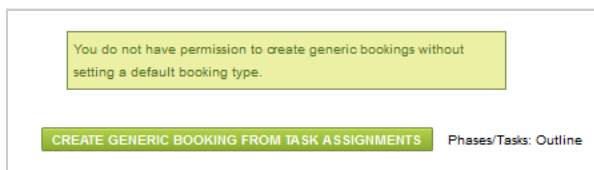
## Auto-Create Bookings for Generic Resources

This feature lets you create a baseline of bookings for generic resources before resources have been committed to it. This feature will create bookings for each and every generic assigned to a project, via a button on the outline view. The feature can only be enabled if 'Enable approvals for bookings' is enabled.

Switch is 'Enable creation of bookings for generics from project plan.' Role permission is 'Create bookings for generics from project plan'. A user does not need to have the ability to otherwise view/modify/create bookings, or even have access to the Resources module to use this, so long as they have the role permission.

**Note:** You must have booking approvals enabled to use this feature.

To enable this feature, contact OpenAir Customer Support.



## Booking Assignment Date Filters

When this feature is enabled, a new section is added to custom calculation filter forms which allows you to use booking assignment dates as filter criteria.

To enable this feature, contact OpenAir Customer Support.

The screenshot shows a section titled "Date filters for Resources Booking assignment selected values". It contains a table with the following columns: "Date range", "Start (MM/DD/YY)", "End (MM/DD/YY)", "Start Meta-Date", and "End Meta-Date". The rows are:

	Date range	Start (MM/DD/YY)	End (MM/DD/YY)	Start Meta-Date	End Meta-Date
Booking assignment date	Custom =>	06/20/18	09/21/18		
Booking assignment start date	All				
Booking assignment end date	All				
Task calculated start date	All				
Task calculated end date	All				

Below the table is the text: "Select a date range filter or enter a custom date range".

## Bulk Booking Editor

When this feature is enabled multiple bookings can be selected and bulk changes applied across any bookings that have not been rejected. The feature also enables bookings to be cloned with a link maintained to the original booking for reporting purposes.

Resource	Client : Project	Task	Start date (MM/DD/YY)	End date (MM/DD/YY)
Technical writer [Generic resource]	Alert Staffing : VPN Pitch	Select...	07/01/10	07/31/10
Technical writer [Generic resource]	Alert Staffing : VPN Pitch	Select...	08/01/10	08/31/10
Technical writer [Generic resource]	Alert Staffing : VPN Pitch	Select...	09/01/10	09/30/10

The feature is accessed from the **Run an Action > View the selected bookings in the bulk editor** option.

To enable this feature, contact OpenAir Customer Support.

## Bulk Delete Action Respects Booking Rules

This feature prevents a bulk action from bypassing a permission rule set to prevent a booking from being deleted based on certain criteria.

To enable this feature, contact OpenAir Customer Support.


## Consolidated Resource Profiles


Get clear and complete details on each of your resources.

Use consolidated resource profiles to see what skills and experience your resources have at a glance. It is also easy to update your resources' skills - essential for assigning the right resource to the right task and keeping them engaged, motivated, and increasing revenue.

The consolidated resource profile contains a header with customizable information such as the resource's email address, manager, location, or any user custom field arranged in four columns. There is no limit to the number of fields which can be shown in the header.




Last update: 11/16/13 | 08:48 AM



**Carr, Bill**

ACTIVE

Job code

**PM**

Email

**BCarr@demo.com**

Manager

**Collins, Marc**

Department

**London**

Role

**Project manager**

Mobile

**8001 131565**

City

**London**

Country

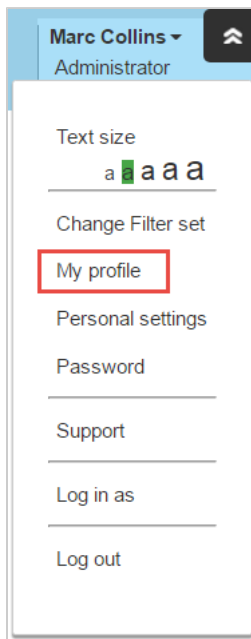
**United Kingdom**

Below the header is a table of the resource's skills and experience. Click each skill to see descriptions of each skill level.

Skills & Experience 			
Education	Job role	Language	MS SQL [Beginner]
BI	Consultant [Secondary]	French [Fluent]	XML [Expert]
ERP	PM [Primary]	Tech skill	Travel preference
PSA	Trainer [Tertiary]	JavaScript [Expert]	International

To enable this feature, contact OpenAir Customer Support.

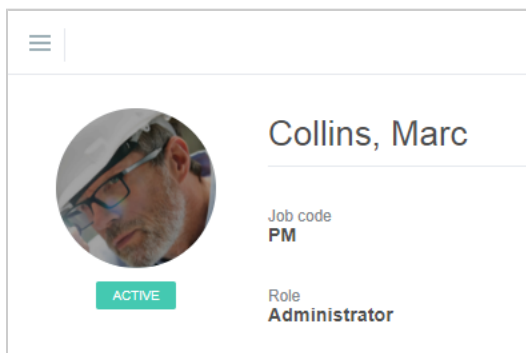
**Note:** Resources with the "View my own profile" role permission can see their information but cannot edit their demographics or custom fields. Resources with the "View and modify my own profile" role permission can also update their skills and experiences, but not the demographics. Users with either role will see a "My profile" link in the User Center which opens the Consolidated Resource Profile.



**Warning:** Users will not be able to see information hidden by a switch or role permission, (for example, "Cost" or "Rate"). These fields will instead display an empty field. Custom fields and their data are always visible. Do not add custom fields to the Resource Profile which should remain hidden from some users.

## Customized User Avatars

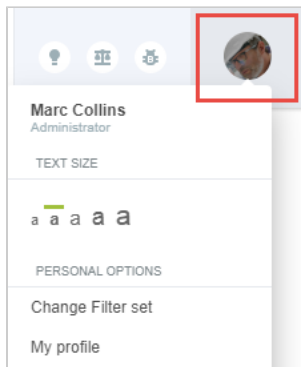
Give your OpenAir resource profiles personality with custom user avatars.



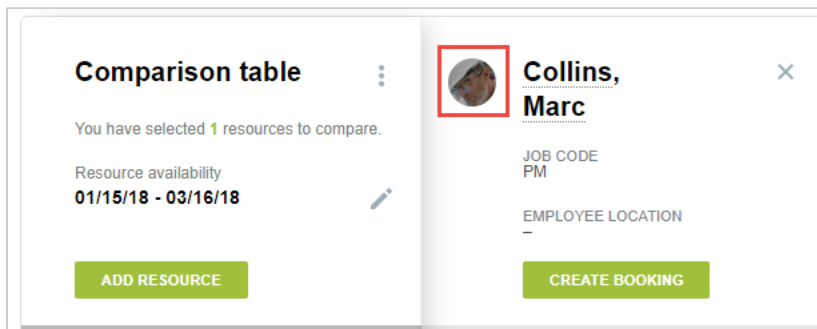
When this feature is enabled, users can now upload their own avatars to replace the generic OpenAir resource avatar in their Resource Profile. The avatars also appear in Consolidated Resource Profile.

The picture used can be resized and repositioned to get your avatar just right.

If using UI4, the customized user avatar appears in the User Center.



Lastly, custom avatars appear in Resource Compare View.



This feature currently supports BMP, GIF, PNG, and JPG images, and the image file size cannot be larger than 1 MB. Uploaded avatar images do not count against your account storage.

**Note:** To enable this feature, contact OpenAir Customer Support and request the **Customized User Avatars** feature. If this feature has been enabled and later disabled, all uploaded avatar images are deleted. This feature also creates two role permissions which can be assigned to users: **Modify own Profile picture** allows users to modify their own profile picture. **Modify all Profile pictures** allows a user to modify all pictures for all users they have access to. The consolidated resource profiles feature must also be enabled to show custom profile pictures on the user interface — see [Consolidated Resource Profiles](#).

## Decouple RDR Header and RRQ Booking Type

Without this feature enabled, the RDR header booking type and its RRQs are connected. Whenever either of these are changed it changes all booking types in the queue for that header and vice versa.

This feature breaks the connection allowing RDR booking types and RRQ booking types to be changed independently.

To enable this feature, contact OpenAir Customer Support.

## Detailed Booking Groupings in the Advanced Booking Worksheet

The Advanced Booking Worksheet rows uses both visible and hidden columns to group bookings under worksheet rows.

This optional feature includes the following functionality:

- All the bookings grouped under a single worksheet row have the same values for all fields except the note, start date and end date fields. Bookings grouped under the same worksheet row not only have the same values in the columns that are visible in the Advanced Booking Worksheet but also have the same value in the columns which are not shown.

**Note:** When the feature is not enabled, bookings grouped under the same worksheet row have the same values in the visible worksheet columns but may have different values in the hidden columns.

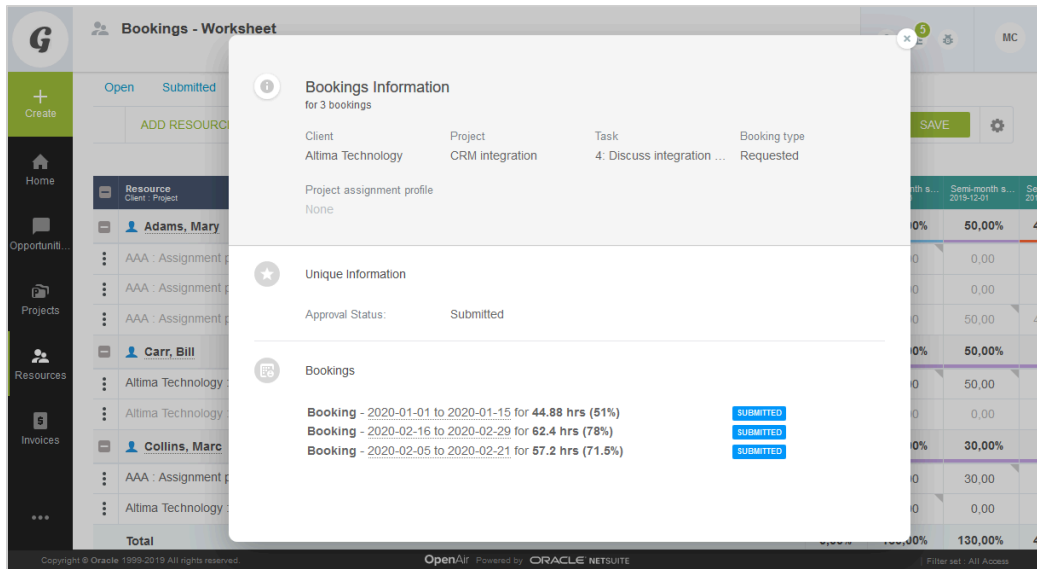
- The **Bookings** column shows an information icon ⓘ next to the number of bookings when both the following conditions apply:
  - Two or more worksheet rows show the same information in the visible columns.
  - Some of the booking information is unique to each worksheet row.

	Carr, Bill					4 bookings
⋮	Altima Technology : CRM integration	4: Discuss integration points	Requester	Select...		1 booking ⓘ
⋮	Altima Technology : CRM integration	4: Discuss integration points	Requester	Select...		3 bookings ⓘ

- To show the details for the bookings grouped under a single row, click the link showing the number of bookings in the **Bookings** column. A popup window shows detailed information for the bookings and the list of bookings sharing this information.

If two or more worksheet rows share some information:

- The shared information is displayed under the **Bookings information** heading.
- The information that is unique to the bookings grouped under the worksheet row is displayed under the **Unique information** heading.



- The improved copy functionality copies all fields from the existing booking except the start date, end date, requester and note fields.

To enable this feature, contact OpenAir Customer Support.

## Disable New, Multiple Bookings Option

This feature removes the Bookings "New, multiple..." option from the Create Button menu.

To enable this feature, contact OpenAir Customer Support.

## Display More Bookings in Advanced Booking Worksheet

Load up to 2,000 bookings at a time.

By default, the Advanced Booking Worksheet loads up to 500 bookings when opened. With this feature, the number of bookings which are loaded can be changed to 1,000 bookings, 1,500 bookings, or 2,000 bookings.

**Note:** Increasing the number of bookings which are displayed in the Advanced Booking Worksheet may impact performance.

To load more bookings in the Advanced Booking Worksheet when opened, contact OpenAir Customer Support and ask them to set the desired number of bookings to display in the Advanced Booking Worksheet.

## Enable a Booking Type to Exist in All Approval Statuses

This feature eliminates the association of a booking type to the approval stages for bookings. When moving from one approval status to the next, the booking type defaults are no longer required to be configured. Any booking type can be associated with any stage.

To enable this feature, contact OpenAir Customer Support.

## Enable Bookings to be Auto-Approved

This feature permits the [Submitter] metavalue to be selected for user and project booking approvals. Booking are then automatically approved once submitted.

To enable this feature, contact OpenAir Customer Support.

## Optional Booking on Approved Booking Requests

Set whether approving a booking request automatically creates a booking or not. When approving booking requests, you can now select a check box to approve a booking request but not create bookings.

To enable this feature, contact OpenAir Customer Support.


## "Require Job Code" Setting for Dynamic and Advanced Booking Worksheets

Use this feature to require users to input a job code when creating bookings in the Dynamic or Advanced Booking Worksheets. When this feature is enabled, if a booking is created or modified, a message will appear for each booking row which does not have a job code assigned to it.

To enable this feature, contact OpenAir Customer Support.

## Resource Booking Approvals

Allows bookings to flow through an approval process. Bookings will have Open, Submitted, Rejected and Approved statuses linked to Booking Types.

 **Note:** The booking approval feature is mutually exclusive with the booking request feature. When booking approvals have been enabled, all existing bookings will be in the "Approved" stage.

To enable this feature, contact OpenAir Customer Support.

## Resource Demand Request

The Resource Demand Request feature can be used to find and book resources. Define the skills required, search and select resources selection based on several indicators (e.g. skills match, utilization %), then issue standard OpenAir bookings for the selected resources.

The Resource Demand Request feature handles booking in a robust way, providing a more transparent overview of the booking progress at each step of its lifetime.

If the Enable a Booking Type to Exist in All Approval Statuses optional feature is also enabled, users with the “Allow change of booking type on finalized resource request” role permission can edit the booking type field on a resource demand request even after the request is finalized and submitted to a resource manager. See [Enable a Booking Type to Exist in All Approval Statuses](#).

To enable this feature, contact OpenAir Customer Support.

The screenshot shows the 'Resource request 1' interface for 'Altima Technology: Backup system implementation'. The top navigation bar includes 'Line items', 'Proposed Resources', 'Booked Resources', 'Properties', and a 'Finalize' button with a 0% progress indicator. A left sidebar contains 'General', 'Base Criteria', 'Resources', and 'Attachments'. The main content area is divided into 'Base Criteria' and 'Resources' sections. Under 'Base Criteria', there are two columns: 'Resource Search Required' (listing 'JavaScript - Beginner' and 'HTML - Beginner' under 'Tech skill') and 'Resource Search Preferred' (listing 'ERP' under 'Product knowledge'). A note states 'Base criteria are locked unless all slots are available.' The 'Resources' section has 'Search and Propose' and 'Book' buttons. Below, a 'Proposed' section lists three resources: Carter, Tom (60% Criteria Match, 100% Forecasted Utilization), Porter, Marie (60% Criteria Match, 100% Forecasted Utilization), and Thompson, Jane (40% Criteria Match, 100% Forecasted Utilization). Each resource has a 'PROPOSED' status label.

## Resource Demand Request Queues Cannot be Finalized If Availability is Zero

With this feature, Resource Demand Request Queues can no longer be finalized if the availability hours or percentage is set to 0.

To enable this feature, contact OpenAir Customer Support.

## Resource Planner

The resource booking planner provides a global view on bookings by calendar and resource utilization calculated per day, week or month. It is the perfect tool to spot under or over utilization and to quickly resolve it.

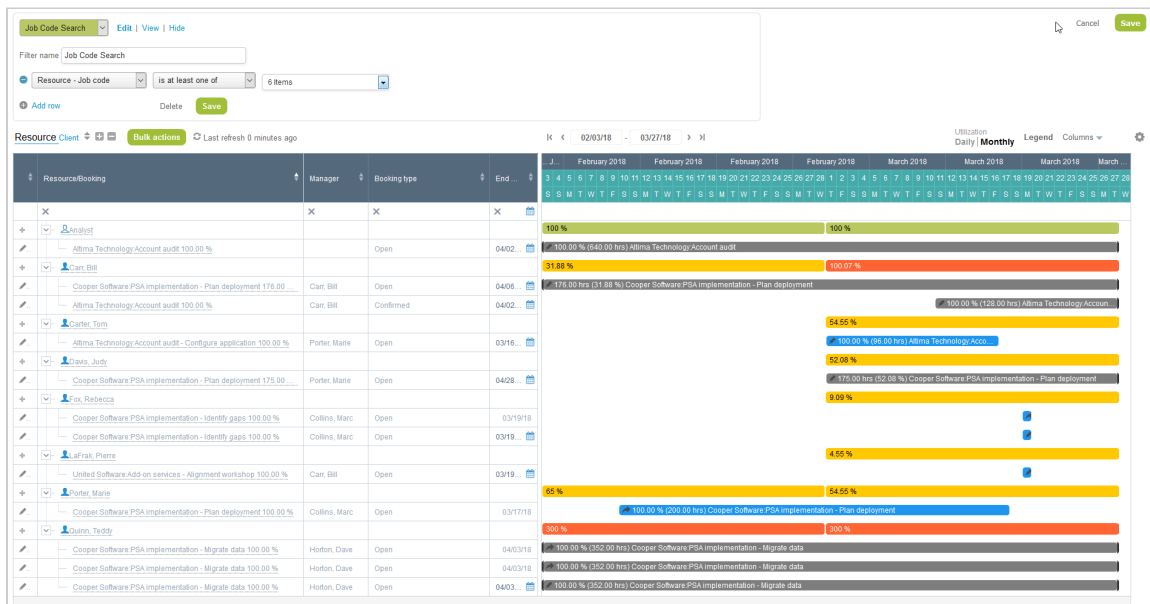
Simply drag and drop to quickly reassign a booking from one resource to another. Drag a box over the required date period next to an existing booking and a new booking will be created, with values sourced from the original booking and the selected date range. Open the Edit Booking form by clicking the **Edit this booking** icon or use the **More options** icon to create, edit, duplicate or delete bookings directly from the resource planner. Overbooked resources are highlighted in the customer view. When a booking is changed the utilization bar is changed to “Unknown”. The new utilization is calculated when the booking is saved. All bookings for one resource can be rolled up to one line to use less space if there are no overlapping bookings. Two new options are made available on the booking planner settings to give the visibility of resources which are inactive or with no bookings for the specified period.

**Note:** If the Resource Booking Approvals feature is enabled for your account, depending on your OpenAir account configuration, bookings with the approval status "Submitted" or "Approved" cannot be modified. You cannot drag to change the start date, end date, duration or resource booked from the Resource Booking Planner view.

In the redesigned resource booking planner, the **Refresh** button and the **Legend** have been relocated to the toolbar. This increases the screen real estate for data on the resource booking planner grid and chart.

With this feature enabled, overbooked resources are highlighted in the customer view. Click the arrow on the left to get to the resource view and analyze why the overutilization has occurred.

To enable this feature, contact OpenAir Customer Support.



## Resource Profile Type Access Control

This feature lets you control access to resource profile types by role. When this feature is enable you can:

- Check the **Restricted** box for a resource profile in Administration > Application Settings > Resources > Resource profiles to restrict access to these resource profiles.

Users must have specific role permissions to view, to select or to modify restricted resource profile types anywhere in OpenAir.

- Assign the following role permissions to specific roles:
  - View restricted profiles** — Users with this role permission can see and select restricted resource profile types, but cannot edit them.
  - View and modify restricted profiles** — Users with this role permission can see, select and edit restricted resource profile types.

To enable this feature, contact OpenAir Customer Support.



Resources Settings **Resource profiles**

Resource Profile Options

Active	Restricted	Profile type	Terminology	Do not pluralize	Preserve case	Attribute set
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Skill	Tech skill	<input type="checkbox"/>	<input type="checkbox"/>	Expertise
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Education	Product knowledge	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Select...
<input type="checkbox"/>	<input type="checkbox"/>	Location	Location	<input type="checkbox"/>	<input type="checkbox"/>	Select...
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Jobrole	Job role	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Level
<input type="checkbox"/>	<input type="checkbox"/>	Industry	Industry	<input type="checkbox"/>	<input type="checkbox"/>	Expertise

## Restrict Utilization Recalculation to Resources Impacted by the Changes on the Advanced Booking Worksheet

Improve the performance of the advanced booking worksheet by restricting utilization recalculation to resources that are impacted by the changes.

By default, when you add, modify, or delete bookings using the advanced booking worksheet, the utilization is recalculated for all shown resources.

With this feature enabled, the utilization is recalculated only for the resources that are impacted by these changes. When you save the advanced booking worksheet, a label appears next to each impacted resource:

- A **Pending calculation** badge indicates that the calculation is in progress. The worksheet may not show the latest booking and utilization information for this resource. Wait for the calculation to complete then reload the page.
- A **Ready** badge indicates that the calculation is completed. To view the latest booking and utilization information for this resource, reload the page.
- A **Changed** badge indicates that changes have been made by another user impacting the information you are viewing. To view the latest booking and utilization information for this resource, reload the page.

To enable this feature, contact OpenAir Customer Support.

Resource		Task
Client : Project		
<div> <div></div> <div>Adams, Mary</div> <div>READY</div> </div>		
<div> <div></div> <div>Altima Technology : ERP deployment</div> </div>		7: Identify gaps
<div> <div></div> <div>Webb Inc. : PSA module deployment</div> </div>		10: Define data migration plan
<div> <div></div> <div>Webb Inc. : PSA module deployment</div> </div>		10: Define data migration plan
<div> <div></div> <div>Carr, Bill</div> <div>CHANGED</div> </div>		
<div> <div></div> <div>Cooper Software : Consulting services</div> </div>		7: Identify gaps
<div> <div></div> <div>Cooper Software : Consulting services</div> </div>		8: Resolve open issues
<div> <div></div> <div>Foster Software : ERP implementation</div> </div>		7: Identify gaps
<div> <div></div> <div>Monrovia Database : Upsell account audit</div> </div>		5: SOW creation
<div> <div></div> <div>United Software : Add-on services</div> </div>		4: Plan deployment
<div> <div></div> <div>United Software : Add-on services</div> </div>		4: Plan deployment
<div> <div></div> <div>Carter, Tom</div> <div>PENDING CALCULATION</div> </div>		
<div> <div></div> <div>Zibura Technologies : Hardware implementation</div> </div>		13: Configure application

## Show Project Assignment Profiles on Task Assignments

This feature ensures that assignment profile values on a task's assignments always remain visible via the user interface and related reports.

Visibility includes on the Task Assignment section of the Create/Edit task form, project outline view, and as a task detail field on reports.

To enable this feature, contact OpenAir Customer Support.

## Skills Approvals

Get control over your resources' skills. With this feature, you can delegate the responsibility of keeping your resources' profiles up-to-date. OpenAir notifies you when your resources update their skills in the Resource Profile. With your approval, the skills are updated.

Tech skill	
HTML	PENDING
[Intermediate]	

Resources with either of the following role permissions can edit their own skills and experience in their profile:

- View and modify own resource profile
- View and modify profiles

When one of your resources makes a change to their resource profile and clicks Save & Submit, the change is marked with a "Pending" tag in their profile.

You will also receive a notification that your resource has made a change to their resource profile. You can set these notifications in Administration > Application Settings > Resources > Notifications. Once set, email notifications will be sent as with other types of approvals when changes are submitted. Reminders will also appear on the Dashboard.

To enable this feature, contact OpenAir Customer Support.

## Use Booking Request Grid to Enter Multiple Requests That Are Available

Similar to the resource booking grid, a booking request grid has been added to Resources to help save time and offer increased flexibility. Using the grid, create multiple booking requests that vary in booking amounts and save and submit them from the grid. A resource can be booked for different hour or percentage amounts during the course of a project. Custom fields can also be added to the grid to tailor the information captured to unique company needs.

To enable this feature, contact OpenAir Customer Support.

## View Advanced Resource Search Role Permission

Control who can access the Advanced Resource Search feature using the **View Advanced Resource Search** role permission.

This optional feature adds a role permission to let you control who can access the Advanced Resource Search feature, otherwise available to all users by default.

To enable this feature, contact OpenAir Customer Support.

# Invoices

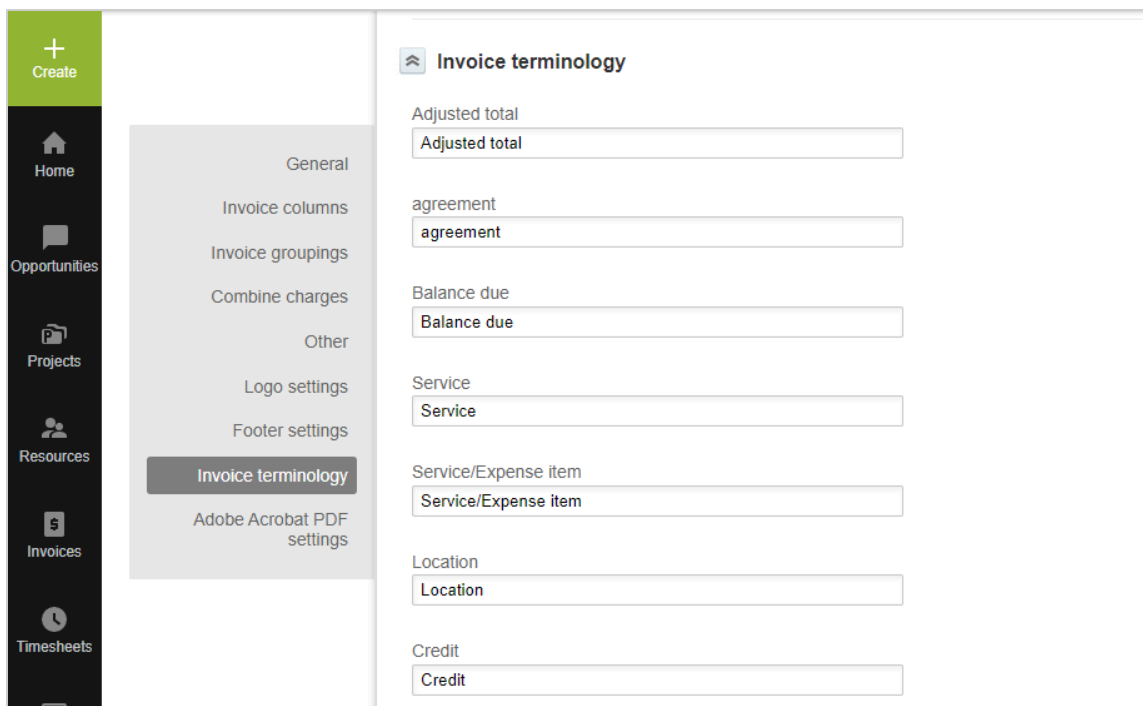
The following optional Invoices features are available in OpenAir. Some features require OpenAir Customer Support to enable them for you.

- [Additional Option for Invoice Layout Terminology Overrides](#)
- [Advanced Agreement and Customer PO Balance Calculation](#)
- [Allow an Approver to Edit a Submitted Invoice](#)
- [Credit and Rebill Functionality for Invoices](#)
- [Custom Fields for Projects as Columns on Charges List Views](#)
- [Display a Zero Sum Tax Rate and Amount on Invoices](#)
- [Enhanced Workflow Process Invoice Submission and Revenue Container Creation](#)
- [Forex Precision Control for Invoices](#)
- [Generate Charges for Partial Periods](#)
- [Negative Charge Stages](#)
- [Negative Charge Stages by Quantity](#)
- [Prevent Invoicing and Revenue Recognition Per Customer PO and Agreement](#)
- [Pro-Rate Selected Charges](#)
- [Save Invoices Short URL](#)
- [Save Payment Terms Internal ID on Invoice Records](#)
- [Subtotal and Sort Expense Item Groups on Invoices](#)

## Additional Option for Invoice Layout Terminology Overrides

For companies that send invoices to their customers directly from OpenAir, different invoice layouts can be configured to modify the appearance of an invoice based on customer needs. Invoice layouts can be assigned at the customer, project or invoice level. In addition to being able to sort or group items, the terminology for certain fields can be overridden and applied to that specific invoice layout. OpenAir enhanced the configuration capabilities of invoice layouts by adding the ability to override the terminology for "Agreement" and "Customer PO". This feature adds overriding the terminology for "Customer PO Number".

To enable this feature, contact OpenAir Customer Support.



**Invoice terminology**

Adjusted total  
Adjusted total

agreement  
agreement

Balance due  
Balance due

Service  
Service

Service/Expense item  
Service/Expense item

Location  
Location

Credit  
Credit

## Advanced Agreement and Customer PO Balance Calculation

OpenAir's agreement and customer PO functionality permits companies to track what's been billed against an agreed upon amount with their customer. For example, if a customer agrees to a \$10,000 contract for a project, an agreement or customer PO can be created for the \$10,000. As work is being performed and charges are generated via billing, the contract amount can then be drawn down based on charge amounts. As the project progresses, it is beneficial to see the remaining balance on the contract to ensure that the project is still on track.

OpenAir has the option for advanced balance calculations for agreements and customer POs. With this advanced calculation, users have the ability to configure charge stages indicating when charges should be deducted from the agreement or customer PO balance. Within a charge stage, users can choose to have the balance deducted for all charges, charges placed on an invoice, charges not on an invoice, or no charges. The agreement or customer PO balance will deduct the charge amount from the balance based on the rule selection on the charge stage. For example, if the rule for the "Write-Off" charge stage is set such that no charges placed in that charge stage should be deducted, any charge placed in that charge stage will never be deducted from the balance.

To enable this feature, contact OpenAir Customer Support.

## Allow an Approver to Edit a Submitted Invoice

Companies often require their users to submit invoices for approval by the finance department or management. To ensure the billing process is not delayed, it is beneficial for the approver to be able to make modifications to the invoice or associated charges. Previously, to make changes to the invoice, it needed to be rejected.

When this feature is enabled, to edit a submitted invoice, approvers navigate to Invoices > Invoices > Submitted and select an invoice. To edit the invoice header information, click on the "Edit" or "Properties" link. Edit the form and click Save. To edit the associated charges, click on the "Change charges" or "Charges" link. Edit or remove individual charges.

To enable this feature, contact OpenAir Customer Support.

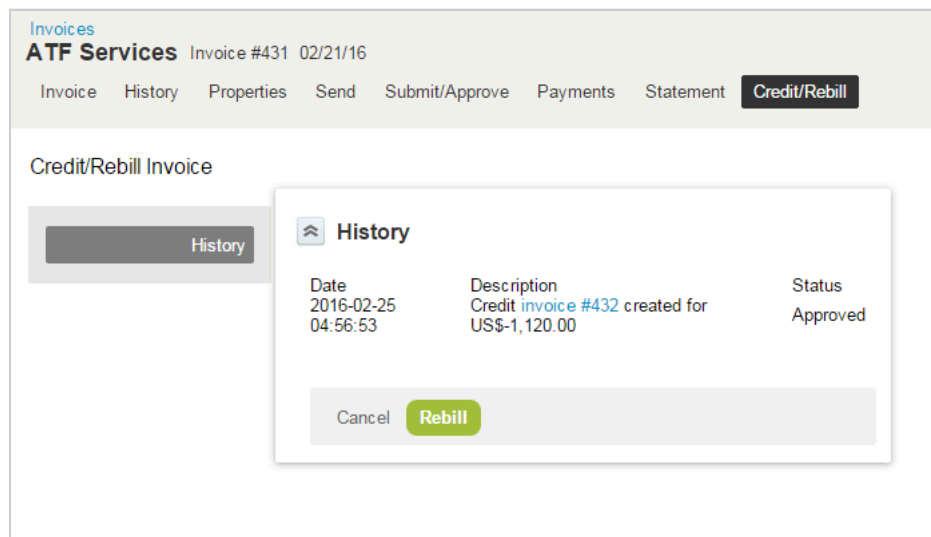
## Credit and Rebill Functionality for Invoices

OpenAir's invoicing functionality lets you group multiple charges that should be billed and sent to a customer. Invoices can be sent through an approval process, sent to a customer and subsequently exported to an external accounting system. At times it is necessary to credit and potentially rebill an invoice that has already been approved, sent to a customer, or has been exported. By default, if an invoice and corresponding charges have been approved or exported, a credit would need to be applied manually creating negative offsetting charges. New charges would also need to be created manually if the invoice needed to be rebilled.

The Credit and Rebill feature streamlines the process of crediting an invoice and rebilling associated charges once a credit has been issued. After you enable this feature, Go to the Credit/Rebill tab on the invoice record to credit, or credit and rebill an invoice. If you credit an invoice, a new invoice will be created that contains offsetting charges of the original invoice. If you then rebill the invoice, the charges from the original invoice will be available to be placed on a new invoice. Both credit and rebill invoices will go through the same approval process as the original invoice. Additionally, the History link in the original invoice will indicate whether the invoice has been credited or rebilled, with the corresponding invoice numbers.

You can enter the invoice date when you create the credit invoice. Account administrators can set the **Invoice credit date** as either the date from the original invoice or today's date (default). This date is visible on credit invoices, and can be edited until the credit invoice is approved. To set the Credit Invoice Date, go to Administration > Application Settings > Invoices > Other settings.

To enable this feature, contact OpenAir Customer Support.



## Custom Fields for Projects as Columns on Charges List Views

Add columns for custom fields associated with project records to charges list views.

To enable this feature, contact OpenAir Customer Support.

## Display a Zero Sum Tax Rate and Amount on Invoices

For companies that send invoices to their customers directly from OpenAir, multiple invoice layouts can be configured to enhance the appearance of the invoice. For various reasons, it may be necessary to display the total tax amount, even if the tax amount is zero.

OpenAir has the ability for users to enter a zero percentage for the tax rate if leveraging tax locations. When a percentage for a tax location is entered as a blank or zero value, the percentage rate will be saved as 0%.

To enable this feature, contact OpenAir Customer Support.

The screenshot shows the 'Tax locations' configuration page in OpenAir. The 'Tax rates' section is highlighted with a red box. The form for 'UK Exempt' includes fields for Federal, State, GST, PST, and VAT percentages. A red note indicates that blank values will be saved as 0%.

## Enhanced Workflow Process Invoice Submission and Revenue Container Creation

This feature enhances the workflow process for invoice submission and revenue container creation. When billing has been run and an invoice has been created, a new link is now available on the invoice screen that will submit the invoice, run revenue recognition on the project, and create a revenue container in one single click. When all actions have been performed, users will automatically be brought to the Balance Summary page of the new revenue container. OpenAir will perform the appropriate checks to ensure that the project meets all the criteria for a new revenue container.



**Invoices**  
**Damus Inc.** Invoice #415 11/02/13

Invoice History Properties Send Submit/Approve Payments Statement Credit/Rebill **Generate Revenue container**

**Automatically Generate New Revenue container**

Create all available new recognition transactions associated with the 'Payroll integration' project.

Generate a new Revenue container for all existing recognition transactions associated with the 'Payroll integration' project.

☐ Do not show this confirmation request again (it can be turned back on in personal settings).

**Continue**

**Note:** If there is an existing revenue container that has not yet been approved, an error message will appear indicating that an open or submitted revenue container still exists and therefore OpenAir cannot automatically submit the invoice and create the revenue container. There will be a link in the error message pointing to the existing revenue container that needs to be approved.

To enable this feature, contact OpenAir Customer Support.

## Forex Precision Control for Invoices

For invoices and revenue recognition transactions, the following currencies now have fixed decimal places matching the number of decimal places for these currencies in NetSuite.

To enable this feature, contact OpenAir Customer Support.

Currency Name	Currency Abbreviation	Decimal Places
Armenian dram	AMD	0
Belarusian ruble	BYR	0
Burundian franc	BIF	0
Central African CFA franc (Financial Community of Africa)	XAF	0
CFP franc (Pacific Franc Exchange)	XPF	0
Chilean peso	CLP	0
Chilean Unidad de Fomento (funds code)	CLF	0
Colombian peso	COP	0
Comorian franc	KMF	0
Djiboutian franc	DJF	0
Guinean franc	GNF	0

Currency Name	Currency Abbreviation	Decimal Places
Hungarian forint	HUF	0
Icelandic krona	ISK	0
Indonesian rupiah	IDR	0
Iranian rial	IRR	0
Japanese yen	JPY	0
Laotian kip	LAK	0
Lebanese pound	LBP	0
Myanmar kyat	MMK	0
North Korean won	KPW	0
Paraguayan guarani	PYG	0
Rwandan franc	RWF	0
Sao Tome & Principe dobra	STD	0
Sierra Leonean leone	SLL	0
South Korean won	KRW	0
Ugandan shilling	UGX	0
Vanuatu vatu	VUV	0
Vietnamese dong	VND	0
West African CFA franc (Financial Community of Africa)	XOF	0
Yemeni rial	YER	0
Zambian kwacha	ZMK	0
Angolan kwanza	AOA	1
Macanese pataca	MOP	1
New Taiwan dollar	TWD	1
Bahraini dinar	BHD	3
Iraqi dinar	IQD	3
Jordanian dinar	JOD	3
Kuwaiti dinar	KWD	3
Libyan dinar	LYD	3
Omani rial	OMR	3
Tunisian dinar	TND	3

## Generate Charges for Partial Periods

This feature permits a user to generate charges for incomplete periods. For example, a user wants to charge a customer \$1000 a month on the 1st of each month. But a one month contract was signed on the 15th which means that the customer needs to be charged \$500 for the current month and \$500 for the next month.

This feature is used to create fractional charges for incomplete periods.

This feature works for:

- Project > Financials > Billing Rules (fixed fee on date or milestone)
- Project > Financials > Revenue Recognition Rules (fixed amount on date or milestone rule)



**Important:** This feature is not designed to work with the repeat for X number of instances option.

To enable this feature, contact OpenAir Customer Support.

## Negative Charge Stages

There is a new option available from Administration > Application Settings > Invoices > Charge stages > [select Charge stage] > [Options].

Charge stages can be consider as 'Regular' or 'Negative' based on the setting of the All charges within this stage to be multiplied by -1 checkbox:

- **Negative Stage** - All charges within this stage to be multiplied by -1 is checked.
- **Regular Stage** - All charges within this stage to be multiplied by -1 is NOT checked.

Invoices Settings **Charge stages**

Cancel **SAVE** **SAVE & CREATE ANOTHER**

**General**

Options

Other

**New Negative Charge Stage**

Charge stage

Negative Charge Stage

**Options**

Check the options to allow at this charge stage. Individual employees may have further restrictions to these options based on their role.

☐ Display charges in a separate tab

☐ Exclude charges from invoicing

☐ Exclude charges from project analysis

☐ Set this as the primary stage for 'credits'

☒ All charges within this charge stage to be multiplied by -1

When a charge is moved from a Regular Stage to a Negative Stage (and vice versa) the charge is multiplied by -1. The charge is not changed if it is moved between two stages of the same type.

Negative charge stages cannot be selected on billing rules.

To enable this feature, contact OpenAir Customer Support.

## Negative Charge Stages by Quantity

This option is available to multiply by quantity instead of rate when using negative charge stages. This permits the account to decide if they want the QTY or the RATE multiplied by -1.

To enable this feature, contact OpenAir Customer Support.

**Edit expense item charge**

Cancel Delete **Save**

Client : Project  
Altima Technology : ERP deployment

Expense item  
Select...

Employee  
Collins, Marc

Customer PO  
PO11038365

Cost center  
01-Boston

Date (MM/DD/YY)  
02/29/16

Accounting date (MM/DD/YY)  
02/29/16

Quantity  
-1

Price  
1999.99

Currency  
USD

Payment type  
Employee paid

Expense item location  
Boston, MA

Description

Notes

Charge stage  
Negative Charge Stage

Repeat charge > Create

## Prevent Invoicing and Revenue Recognition Per Customer PO and Agreement

Often, companies plan Customer POs and Agreements and have users begin work before they are signed. In addition to having users log time and expenses, accurate billing and revenue forecasting is necessary for these cases. However, since these are considered to be part of at risk projects, invoicing, revenue recognition transaction, and revenue container creation should be prohibited.

OpenAir has the ability to designate specific Customer POs and Agreements that should prevent invoicing and revenue recognition creation. If a Customer PO / Agreement has the option enabled, users will not be able to use the associated charges in invoices, revenue recognition transactions or revenue containers for that Customer PO / Agreement until that option has been disabled. However, billing rules, revenue recognition rules, charge and revenue projections, project billing transactions, and charges can be created for the project.

To enable this feature, contact OpenAir Customer Support.

**Invoices Settings** **Agreements**

**General** **Attachments**

Cancel **SAVE** **SAVE & CREATE ANOTHER**

**New**

Agreement  Client

Number  Date (MM/DD/YY)  Amount (money)  Currency

Notes

☒ Active agreement

☒ Prevent invoice revenue creation agreement  
Prevent invoice revenue creation agreement

## Pro-Rate Selected Charges

This feature lets you select one or more charges and then pro-rate the charges total.

You enter one of the value fields and the other two are then automatically calculated. For example, if the **Total selected** is \$1,600.00 and 80% is entered into **Retain %** then **Retain total** is assigned 1280 and **Move remaining** is assigned 320.

All

Select the charges to invoice

**Pro-rate selected Charges total**

Retain (%):  Retain total:  Move remaining  to:

**PRO-RATE**

Date	Time	Description	Person	Stage
01/14/13	8 hrs	ERP deployment	Pimm, Joe	Testing
01/15/13	8 hrs	ERP deployment	Pimm, Joe	Testing

**Customer POs** **Balance** **7 Selected Charges** **Charges**

PO11038365 #PO11038365 \$1,750,000.00 US\$654,809.51

Action  **Pro-rate Charges total** **Total selected \$8,500.00** **SAVE**

**RUN** **CHECK ALL** **UNCHECK ALL**

You can move the remaining total to a specific charge stage.

To enable this feature, contact OpenAir Customer Support.

## Save Invoices Short URL

This optional feature adds the custom field **Online Invoice** [openair\_invoice\_short\_url] to the Invoice entity. The custom field is used to store the invoice URL that OpenAir generates automatically when an invoice is created. It is read-only and appears on the invoice properties form as a hyperlink.

Administrators can control who can view the **Online Invoice** link on the invoice properties form using form permissions.



**Tip:** All users will be able to see the **Online Invoice** link by default. Make sure you set the relevant form permissions after you enable this feature if access needs to be restricted.

The **Online Invoice** custom field supports read requests using the XML API, SOAP API and User Scripting.



**Note:** The invoice URL is the short URL included in the body of the invoice email when you navigate to the Send tab for a given invoice record in OpenAir.

To enable this feature, contact OpenAir Customer Support.

## Save Payment Terms Internal ID on Invoice Records

Depending on your account configuration, you can select the payment terms on the invoice entity property form using a dropdown list. By default, the payment terms name is saved on the invoice record but not the payment terms ID.

This optional feature sets the internal ID of the payment terms selected for the invoice automatically when you create a new invoice or update an existing record. If your account is configured to show internal IDs on list views or on reports and if you are an account administrator or have the relevant role permissions, you can add the Internal ID - payment\_terms\_id column on list views or the Internal ID - payment\_terms\_id attribute to Invoice detail reports.

With this feature enabled, the payment\_termsid value can be retrieved and modified using the XML or SOAP API.

To enable this feature, contact OpenAir Customer Support.




**Note:** If the **payment terms** field currently shows as a text field on the invoice property form, it will show as a dropdown list after you enable this feature. The payment terms internal ID will not be populated for existing invoice records when you enable this feature. To set the payment terms internal ID for existing records, you can either save existing invoices manually or use the XML or SOAP API.

## Subtotal and Sort Expense Item Groups on Invoices

These features allow you to change the sorting and subtotal appearance in invoices.


- **Sort all expense items alphabetically** — when selected, all expense items are sorted alphabetically. If cleared, the order in which these expenses groups were created is preserved.

- **Display subtotals for custom expense item groups when using alternate invoice layout for expense charges** — Select this option to display subtotals for custom expense item groups on invoices.

 **Note:** These features are only supported when the invoice layout uses custom groupings and an alternate layout for expenses.

To change these settings, go to Administration > Application Settings > Invoices > Invoice layouts > [select a layout] and go to the “Combine charges” section of the form.

To enable this feature, contact OpenAir Customer Support.

 **Note:** This feature also requires invoice layouts to allow users to define aggregate expense items. To enable this feature, contact OpenAir Customer Support and request the **Enable Custom Groupings of Expense Item Charges on an Invoice** account setting.



# Reports

The following optional Reports features are available in OpenAir. Some features require OpenAir Customer Support to enable them for you.

- [Audit Trail Values Available in Summary Reports](#)
- [CSV Pivot Tables Can Respect User Regional Settings](#)
- [Custom Fields Available as Filters in Selected Reports](#)
- [Email Scheduled Reports to a Contact from the Contacts List](#)
- [Enable Booking Approval Status in Reports](#)
- [Exclude Specific Values from Filters in Reports](#)
- [Hide Personal User Data and Hours Remaining in the Timesheet Report](#)
- [Loaded Cost Respects Time Entry Date Regardless of Date to Use Value in Reports](#)
- [Organize Saved Reports in Specified Folder](#)
- [Project Hierarchy Settings in User Detail Report](#)
- [Project Crosstab Date Filters](#)
- [Report Manager and Editor](#)
- [Report on More than 31 Days When Reporting on Daily Time Periods](#)
- [Report Throttling](#)
- [Stricter Permission Control for Extended Fields Derived from Employee Cost Information](#)
- [Web Services Log Details Report](#)

## Audit Trail Values Available in Summary Reports

This feature leverages the audit information stored in OpenAir and permits users to run a summary report on individual form values for a specified time period and have the report return what the value was at that specified point in time. In addition, it displays the user name of whoever changed the value.

To enable this feature, contact OpenAir Customer Support.

Global report options

General

Not applicable settings

Display settings

Adobe Acrobat PDF settings

Multiple currencies

Audit trail fields

Cancel SAVE

**General**

Weekly and Bi-weekly report columns starts on  Date to use in column titles ☒ Use starting date ☐ Use ending date

Not applicable settings

Display settings

Adobe Acrobat PDF settings

Multiple currencies

Audit trail fields

Select the audit trail fields you want to report on

Available

- Audit - Agreement - Accounting code
- Audit - Agreement - Accounting date
- Audit - Agreement - Active
- Audit - Agreement - Client
- Audit - Agreement - Currency
- Audit - Agreement - Date
- Audit - Agreement - External ID
- Audit - Agreement - Name
- Audit - Agreement - Notes
- Audit - Agreement - Number

Selected

Add selected > < Remove selected  
Add all > < Remove all

## CSV Pivot Tables Can Respect User Regional Settings

This feature enables a new option for CSV Pivot Tables exports to respect user regional settings to delimit values.

To enable this feature, contact OpenAir Customer Support.

Employees  
Bill Carr

Demographic Access control Schedule Cost Proxy Filter sets Leave accrual Employee entity tag Target utilization

General

Additional information

Support Settings

Email Settings

Optional Features

Time Settings

Regional Settings

**Regional Settings**

Language

Date format

Number format

List separator for CSV output files

**Print Settings**

Page size for generating PDF pages

## Custom Fields Available as Filters in Selected Reports

This feature makes user and project custom fields available as filters in selected detail reports:

- Project and user custom fields are available in Time entry and Receipt detail reports.
- Project custom fields are available in Charge and Revenue transaction detail reports.

To enable this feature, contact OpenAir Customer Support.

## Email Scheduled Reports to a Contact from the Contacts List

With this feature, users have the option to send scheduled reports to additional email addresses on the Contacts list. Enter contact information including the email address in the Contacts form and send reports to that email address.

When the report runs, the results will be sent to the contact's email address.

To enable this feature, contact OpenAir Customer Support.

The screenshot shows the 'General' settings for a report. In the 'Email options' section, the 'Additional contacts: > Create' link is highlighted with a red box. A red arrow points from this link to a 'Contacts' dialog box. The dialog box has two columns: 'Available' and 'Selected'. The 'Available' column lists several contacts, including 'Brillstein, Val', 'Brown, Ashley', 'Brown, Sandra', 'Clifton, Tom', 'Cooper, John', 'Cooper, Kendra', 'Craven, Scott', 'Damus, Richard', 'Deans, Ben', and 'Gariepy, Jenny'. The 'Selected' column lists 'Cooper, John' and 'Gariepy, Jenny'. Below the lists are buttons for 'Add selected >', 'Add all >', '< Remove selected', and '< Remove all'. At the bottom of the dialog are 'Cancel' and 'OK' buttons.

## Enable Booking Approval Status in Reports

This feature enables a booking approval status column and filter in both summary and detail reports.

**Note:** To be able to use booking approval status in the slip/revenue projection reports, the projections need to be re-run. Projections will be re-run over the weekend after the release.

To enable this feature, contact OpenAir Customer Support.

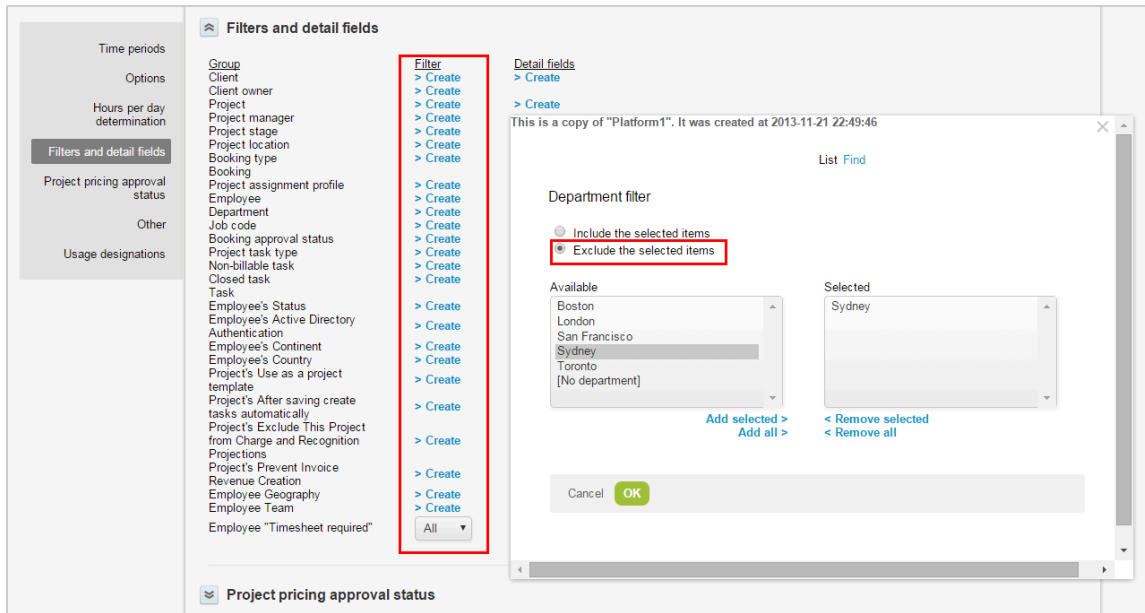
Booking Status Report		
Crosstabbed > Resources > by Employee		
<div>Run Preview</div> Monthly Employees Report - All booked hours (12/01/15 - 02/29/16)		
Rows and Columns	<div>show all hide all</div>	
	<div>Employee/Booking approval status</div>	
Datasets	<div>Dec-2015</div>	
	<div>Adams, Mary</div>	
Settings	Submitted	
	72	
	Carr, Bill	
	0	
	Open	
	0	
	Carter, Tom	
	0	
	Submitted	
	0	

## Exclude Specific Values from Filters in Reports

OpenAir reporting permits great flexibility in providing key information to users and managers. In addition to selecting a multitude of reporting values, users can configure filters within a report to limit the items that need to be included in the report. For example, if running a utilization report, managers may choose to only report on the utilization value for full-time employees. To do this, users would click on the Resource filter on the report edit form and include the individual users that should be displayed in the report results. For some companies, there may be a larger number of full-time employees than part-time employees and therefore managers may wish to exclude the part-time employees from the report rather than include all full-time employees.

Furthermore, new full-time employees may continue to be hired. This feature adds the ability for users to select an option to exclude values from specific filters in a report. In the aforementioned example, a user may wish to exclude part-time employees. Thus, all existing and newly hired full-time employees will automatically be included in the report results.

To enable this feature, contact OpenAir Customer Support.



## Hide Personal User Data and Hours Remaining in the Timesheet Report

Keep personal user data safe with a new feature which hides this data in the timesheet report.

This feature hides personal data from timesheet reports, but not from other reports where you may need that information.

### To hide personal user data in Timesheet reports:

1. Go to Administration > Application Settings > Timesheets > Timesheet report layout.
2. Select "Hide personal user information on timesheet reports".

**Note:** The "Hide personal user information on timesheet reports" option will not appear in the Timesheet report layout form if your company has the "Hide personal employee information on reports" internal setting enabled. Contact OpenAir Customer Support to enable or disable this internal setting.

The "Hours Remaining" field in Timesheet Reports can also be hidden.

### To hide the "Hours Remaining" field in Timesheet Reports:

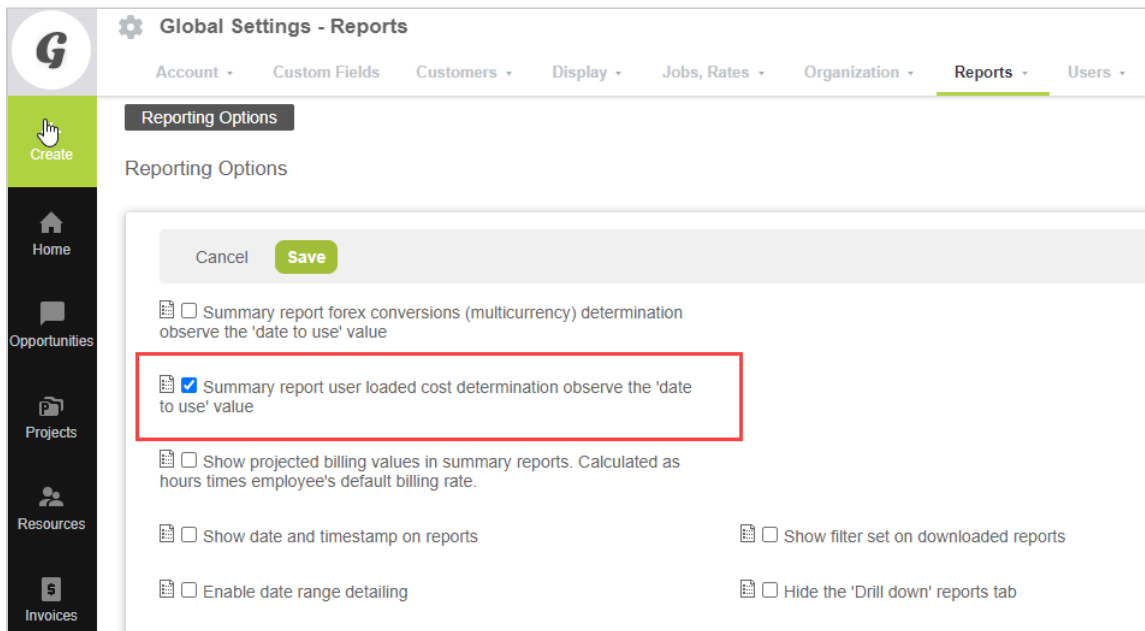
1. Go to Administration > Application Settings > Timesheets > Timesheet report layout.
2. In the "Other" section of the Timesheet report layout form, select the "Hide "Hours remaining on tasks" section on timesheet reports" setting.

## Loaded Cost Respects Time Entry Date Regardless of Date to Use Value in Reports

Without this feature, for accounts that leveraged the “Summary report forex conversions (multicurrency) and user loaded cost determination observe the ‘date to use’ value” feature, the date used applies to both the loaded cost report values as well as the forex conversions.

The date selected will be used as the reference for when a report value uses a loaded cost value as well as report values that use forex conversions. With this feature, users can choose to only apply the ‘date to use’ value to either the forex conversion or the loaded cost values.

To enable this feature, contact OpenAir Customer Support.



**Global Settings - Reports**

Account ▾ Custom Fields Customers ▾ Display ▾ Jobs, Rates ▾ Organization ▾ **Reports ▾** Users ▾

**Reporting Options**

Reporting Options

Cancel Save

☐ Summary report forex conversions (multicurrency) determination observe the 'date to use' value

☒ Summary report user loaded cost determination observe the 'date to use' value

☐ Show projected billing values in summary reports. Calculated as hours times employee's default billing rate.

☐ Show date and timestamp on reports ☐ Show filter set on downloaded reports

☐ Enable date range detailing ☐ Hide the 'Drill down' reports tab

## Organize Saved Reports in Specified Folder

OpenAir reports often fall into distinct categories such as Financials, Project status, Resource management, etc. As an account may have a very high volume of saved reports, it is helpful to group specific reports together based on report type. With this feature, saved reports can now be organized into different report folders and sub-folders. Report folders can be expanded or collapsed depending upon the need to view certain reports in a particular folder. In addition, folders can be shared with other users - reports within the folder will also be shared.

To enable this feature, contact OpenAir Customer Support.

The screenshot shows the 'My reports' section of the OpenAir interface. At the top, there are tabs for 'My reports', 'Shared reports', and 'All reports'. Below these are 'show all' and 'hide all' buttons. The main area is a table with columns: 'Name', 'Action', and 'Share status'. A dropdown menu is set to 'All'. A red bracket groups the first few rows under the label 'Folder'. The first row is 'Key Reports' (indicated by a folder icon). The subsequent rows are reports within that folder: '2.3.2 Project Burn (\$)', '3.1.1 Booked Utilization - Monthly', '3.2 Supply vs. Demand Report', '4.2 Timesheet Status Report', '7.1 Project Financial Analysis - Profit', '7.6 Forecast Revenue by Stage', and '7.9 Employee Realization'. The last two rows are '1. Opportunity Management' and '2. Project Administration & Management'. The 'Share status' column shows 'Not shared' for most, and 'Shared with 2 employees' for the last two.

Name	Action	Share status
All		
Key Reports		Not shared
2.3.2 Project Burn (\$)		Not shared
3.1.1 Booked Utilization - Monthly		Not shared
3.2 Supply vs. Demand Report		Not shared
4.2 Timesheet Status Report		Not shared
7.1 Project Financial Analysis - Profit		Not shared
7.6 Forecast Revenue by Stage		Not shared
7.9 Employee Realization		Not shared
1. Opportunity Management		Not shared
2. Project Administration & Management		Shared with 2 employees

## Project Hierarchy Settings in User Detail Report

This feature enables a new “project hierarchy” value in the user detail report.

To enable this feature, contact OpenAir Customer Support.

## Project Crosstab Date Filters

Use new filters to better define the scope of your reports.

The new filters include:

- Scheduled project start date
- Calculated project finish date
- Project created date

To enable this feature, contact OpenAir Customer Support.

## Report Manager and Editor

The Report Manager and Editor feature lets you:

- Search for saved reports and report templates by report name or by report content.
- Get a quick report configuration preview without losing the search results.
- See all the available report actions and select directly from the search results.
- Create reports by dragging dimensions and measures into your rows and columns, and selecting filters.
- Preview your report layout as you create or edit the report.
- Preview the report data, run and view the full report directly from the report editor page.

To enable this feature, contact OpenAir Customer Support.

**Goldberg SERVICES** Management Advanced Drill down Saved reports Status Options

Search saved reports by name

Projects - All assigned hours Timesheets - All hours

Filter reports which (can) contain Measures and Attributes

Filter reports which can/be Grouped by Hierarchies and Dimensions

ALL 12 ALL SAVED 1 SAVED 1 SHARED 0 TABULAR 0 CROSSTABBED 10

**Account-wide – Company** 10 Rating Template

**2.5 Planned vs. Actual Hours** 10 Rating Saved

**2.5 Planned vs. Actual Hours** 10 Rating Saved

**Account-wide – Employees** 9.8 Rating Template

**Account-wide – Projects** 9.7 Rating Template

Category: Type:

Template specification:  
No description.

Company	AUG-2015	
	Projects - All assigned hours	Time All hours
3 rows	0	

**Honeycomb SERVICES** Management Advanced Saved reports Status Options

Untitled  
Crosstabbed > Account-wide > by Company

**Rows and Columns**

**Dimensions** (Available sub-totals)

- Phase
- Product
- Project
- Project assignment profile
- Project billing transaction
- Project job code
- Project location
- Project manager
- Project stage
- Project task type
- Project's After saving create tasks automatically
- Project's Use as a project template
- Receipt

**Rows** (Selected sub-totals)

- Company
- Employee
- Project

**Columns**

- Date (Monthly)
- Measure names (2)

**Measures** (Available values)

- Timesheets
- Timesheets - All actual cost [primary loaded cost] (USD)
- Timesheets - All actual cost [secondary loaded cost] (USD)

**Measure names**

- Projects - All assigned hours
- Timesheets - All hours

**Run** **Preview**

Employee	JUL-2015		AUG-2015
	Projects - All assigned hours	Timesheets - All hours	Projects - All assigned hours
3 rows	0	0	0

**Drag-and-drop to configure columns and rows**

**Report layout automatically updates here - no page refresh required!**



## Report on More than 31 Days When Reporting on Daily Time Periods

For companies that run summary reports with daily time periods, the actual number of periods can be extended. By enabling this feature, users can choose to report up to either 60 or 90 days. This enhancement permits users to display report values in a daily view for multiple months at a time.

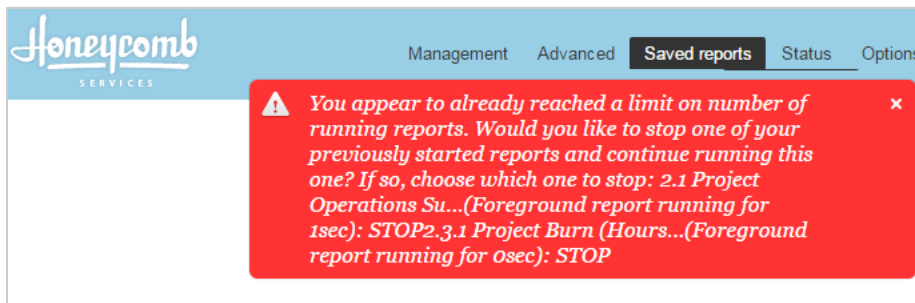
To enable this feature, contact OpenAir Customer Support.

## Report Throttling

With this feature, the number of reports a user can run in parallel can be set to a value between 1 and 10. Individual users can be exempt from the limit (i.e. allowed to run unlimited reports in parallel) by enabling the **Disable Report Throttling** Demographic setting for the user.

When a user tries to run a report but has already reached their limit, the user is presented with a list of their currently running reports and given the option to stop one of them to run the requested report. If the user does not want to stop a report they can cancel the request and either schedule the report or try to run the report later.

To enable this feature, contact OpenAir Customer Support.



## Stricter Permission Control for Extended Fields Derived from Employee Cost Information

Extend standard access control for extended fields and custom calculations derived from employee cost information.

By default, the access control rules for the operands used in a custom calculation apply to the custom calculation. A user can view custom calculations and other extended fields only if this user can view the standard fields, custom fields and extended fields used as operands in the extended field. Until now, the standard access control behavior did not apply to the following standard calculated fields derived from employee cost information. This feature extends standard access control so that users can only see the following fields and custom calculations using any of these fields as operands if their role allows them to view the relevant employee cost information.

- Projects – Projected cost [rules]

- Projects – Projected cost of unbillable hours [rules]
- Projects – Projected billing margin [rules]
- Projects – Projected billing [rules]

The following role permissions are supported:

- View all user costs
- View primary loaded cost
- View secondary loaded cost
- View tertiary loaded cost
- View and modify user cost

**Note:** This extended access control currently does not apply to renamed built-in summary fields based on any of the extended field listed above, and any custom calculations using these renamed built-in summary fields.

The Stricter Permission Control for Extended Fields Derived from Employee Cost Information feature is enabled by default. To disable the feature, contact OpenAir Customer Support.

## Web Services Log Details Report

This feature adds the ability to include web service requests and responses within the application. This will help troubleshoot any API requests that fail.

To enable this feature, contact OpenAir Customer Support.

**Note:** This feature includes an optional component, which may be enabled to help troubleshoot any issues with the add-on services provided by OpenAir.

If you are using Web services log reports to track your API usage limits, note that API requests made by OpenAir Mobile apps, OpenAir Integration Manager and other OpenAir add-on services do not count toward your usage limits.

**Important:** The Web services log report feature has the following limitations:

- If you do not use this feature for more than 30 days, the feature is disabled and the log entries are deleted.
- Log entries are retained for 7 days only, then they are purged from the database.

NETSUITE | OpenAir

Dashboard Expenses Invoices Opportunities ... Reports Workspaces Administration

Summary **Detail** Advanced Saved reports Status Options

Marc Collins Administrator

Web service log detail report

modify report re-run report

Clear sort

Start Date	End Date	API version	Client type	Client version	Status	Request	User	Response
2014-04-08 10:26:47	2014-04-08 10:26:48		RW iPhone	2.0	OK	<a href="#">View</a>	Collins, Marc	<a href="#">View</a>
2014-04-08 10:28:33	2014-04-08 10:28:34	SOAP 1.0	RW iPhone	2.0	OK	<a href="#">View</a>	Collins, Marc	<a href="#">View</a>
2014-04-08 10:31:28	2014-04-08 10:31:29	SOAP 1.0	RW iPhone	2.0	OK	<a href="#">View</a>	Collins, Marc	<a href="#">View</a>
<p>This XML file does not appear to have any style information associated with it. The document tree is shown below.</p> <pre> &lt;?xml version="1.0" encoding="UTF-8" standalone="yes"?&gt; &lt;request API_version="1.0" client="RW iPhone" client_ver="2.0" namespace="default" key="..."&gt;   &lt;Auth&gt;     &lt;Login&gt;       &lt;company&gt;rsi_test&lt;/company&gt;       &lt;user&gt;...&lt;/user&gt;       &lt;password&gt;[CLEANED]&lt;/password&gt;     &lt;/Login&gt;   &lt;/Auth&gt;   &lt;Read type="SummaryView" method="all"/&gt; &lt;/request&gt; </pre>								
2014-04-10 14:29:32	2014-04-10 14:29:34		RW iPhone	2.0	OK	<a href="#">View</a>	Collins, Marc	<a href="#">View</a>
2014-04-10 14:29:44	2014-04-10 14:29:46		RW iPhone	2.0	OK	<a href="#">View</a>	Collins, Marc	<a href="#">View</a>
2014-04-10 17:08:33	2014-04-10 17:08:36		RW iPhone	2.0	OK	<a href="#">View</a>	Collins, Marc	<a href="#">View</a>
2014-04-10 17:08:39	2014-04-10 17:08:41	SOAP 1.0	RW iPhone	2.0	OK	<a href="#">View</a>	Collins, Marc	<a href="#">View</a>

17 rows

# Platform

The following optional Platform features are available in OpenAir. Some features require OpenAir Customer Support to enable them for you.

- [API Access](#)
- [REST API](#)
- [Script Support for Web Service API Methods](#)
- [Script Support for HTTPS Methods](#)
- [User Scripting — Form Scripts](#)
- [User Scripting — Scheduled Scripts](#)
- [User Scripting — Unapprove Event](#)

## API Access

You can use our REST API, SOAP API and XML API to integrate your professional services data with your enterprise data. See the help topic [API Overview](#).

OpenAir API supports OAuth 2.0, a robust authorization framework. This authorization framework enables client applications to use a token to access OpenAir through the API. The application accesses the protected resources on behalf of a user who gave an explicit permission for the access. This method eliminates the need for API integrations to store user credentials.

Before you begin using these services, review the best practice guidelines. See the help topics [Security Considerations for Developers](#) and [API Best Practice Guidelines](#).

To request API access, contact your OpenAir account manager.

## REST API

OpenAir REST API provides an interface for integration applications to exchange information with OpenAir.

The REST API:

- Is organized around [REST](#).
- Uses predictable resource-oriented URLs.
- Accepts [JSON-encoded](#) request bodies.
- Returns [JSON-encoded](#) responses.
- Uses standard HTTP response codes, authentication and verbs.

The REST API lets you:

- Use CRUD (create, read, update, delete) operations on OpenAir records.
- Retrieve a list of records from a collections and use pagination.

- Filter OpenAir record collections.

The REST API is a service layer that is built on top of the business layer in OpenAir. This ensures that business rules configured for your OpenAir account are applied when an integration application interacts with your OpenAir data through the REST API. Business rules include OpenAir account configuration settings and access control mechanisms, as well as any user scripts deployed on your OpenAir account.

The REST API supports OAuth 2.0 exclusively for authentication and authorization, which is a more robust and reliable way to access data.

If the REST API is enabled for your account, account administrators and employees with the Export data role permission can access the REST API definition in OpenAPI 3.0 JSON format. The generated documentation includes a full REST API reference including resource descriptions, endpoints and methods, parameters, request body and response examples and schema.

**expense-reports** Expense reports are collections of expense items (receipts) that employees can use in OpenAir to claim reimbursement.

**POST** `/expense-reports/` Insert an expense report

**GET** `/expense-reports/` Get the list of expense reports

Use this method to retrieve the list of expense reports.

**Parameters**
[Try it out](#)

Name	Description														
<b>q</b> <b>string</b> <i>(query)</i>	Search query used to filter results The following table lists the query operators available for each field type: <table> <thead> <tr> <th>Field Type</th> <th>Allowed Filters</th> </tr> </thead> <tbody> <tr> <td>None</td> <td>EMPTY, EMPTY_NOT</td> </tr> <tr> <td>Boolean</td> <td>IS, IS_NOT</td> </tr> <tr> <td>Double</td> <td>ANY_OF, ANY_OF_NOT, BETWEEN, BETWEEN_NOT, EQUAL, EQUAL_NOT, GREATER, GREATER_NOT, GREATER_OR_EQUAL, GREATER_OR_EQUAL_NOT, LESS, LESS_NOT, LESS_OR_EQUAL, LESS_OR_EQUAL_NOT, WITHIN, WITHIN_NOT</td> </tr> <tr> <td>String</td> <td>CONTAIN, CONTAIN_NOT, IS, IS_NOT, START_WITH, START_WITH_NOT, END_WITH, END_WITH_NOT</td> </tr> <tr> <td>Date</td> <td>AFTER, AFTER_NOT, BEFORE, BEFORE_NOT, ON, ON_NOT, ON_OR_AFTER, ON_OR_AFTER_NOT, ON_OR_BEFORE, ON_OR_BEFORE_NOT</td> </tr> <tr> <td>Logical</td> <td>AND, OR</td> </tr> </tbody> </table> Fields available for filtering are indicated by the mention "Query allowed" in the resource schema. <div>             q - Search query used to filter results&lt;br/&gt;             The followin           </div>	Field Type	Allowed Filters	None	EMPTY, EMPTY_NOT	Boolean	IS, IS_NOT	Double	ANY_OF, ANY_OF_NOT, BETWEEN, BETWEEN_NOT, EQUAL, EQUAL_NOT, GREATER, GREATER_NOT, GREATER_OR_EQUAL, GREATER_OR_EQUAL_NOT, LESS, LESS_NOT, LESS_OR_EQUAL, LESS_OR_EQUAL_NOT, WITHIN, WITHIN_NOT	String	CONTAIN, CONTAIN_NOT, IS, IS_NOT, START_WITH, START_WITH_NOT, END_WITH, END_WITH_NOT	Date	AFTER, AFTER_NOT, BEFORE, BEFORE_NOT, ON, ON_NOT, ON_OR_AFTER, ON_OR_AFTER_NOT, ON_OR_BEFORE, ON_OR_BEFORE_NOT	Logical	AND, OR
Field Type	Allowed Filters														
None	EMPTY, EMPTY_NOT														
Boolean	IS, IS_NOT														
Double	ANY_OF, ANY_OF_NOT, BETWEEN, BETWEEN_NOT, EQUAL, EQUAL_NOT, GREATER, GREATER_NOT, GREATER_OR_EQUAL, GREATER_OR_EQUAL_NOT, LESS, LESS_NOT, LESS_OR_EQUAL, LESS_OR_EQUAL_NOT, WITHIN, WITHIN_NOT														
String	CONTAIN, CONTAIN_NOT, IS, IS_NOT, START_WITH, START_WITH_NOT, END_WITH, END_WITH_NOT														
Date	AFTER, AFTER_NOT, BEFORE, BEFORE_NOT, ON, ON_NOT, ON_OR_AFTER, ON_OR_AFTER_NOT, ON_OR_BEFORE, ON_OR_BEFORE_NOT														
Logical	AND, OR														
<b>offset</b> <b>integer</b> <i>(query)</i>	A cursor for pagination. The offset defines the index of an object in the list of results. This object will be the first in the list of objects included in the response. <div>offset - A cursor for pagination. The offset defines the index of</div>														
<b>limit</b> <b>integer</b> <i>(query)</i>	The maximum number of objects to include on a single page in the response. <div>limit - The maximum number of objects to include on a single</div>														
<b>fields</b> <b>string</b> <i>(query)</i>	A comma-separated list of attributes to include in the response. If not specified, the response includes all attributes for each object returned. <div>fields - A comma-separated list of attributes to include in the r</div>														

To enable the REST API, contact OpenAir Customer Support.

**Note:** [API Access](#) must be enabled for your account before you can enable the REST API. To obtain API Access, contact your OpenAir account manager.

**Important:** The REST API was introduced in the October 10, 2020 OpenAir release. It is an initial version with limited functionality.

Some optional features and application settings may not be fully supported.

As with any other API or platform features, it is crucial that you test integration applications leveraging the REST API extensively on a Sandbox account. Make sure your integration applications run smoothly without error on a non-production account before you implement it on your production account.

## Script Support for Web Service API Methods

This feature allows you to access NSOA.wsapi functions for user scripting.

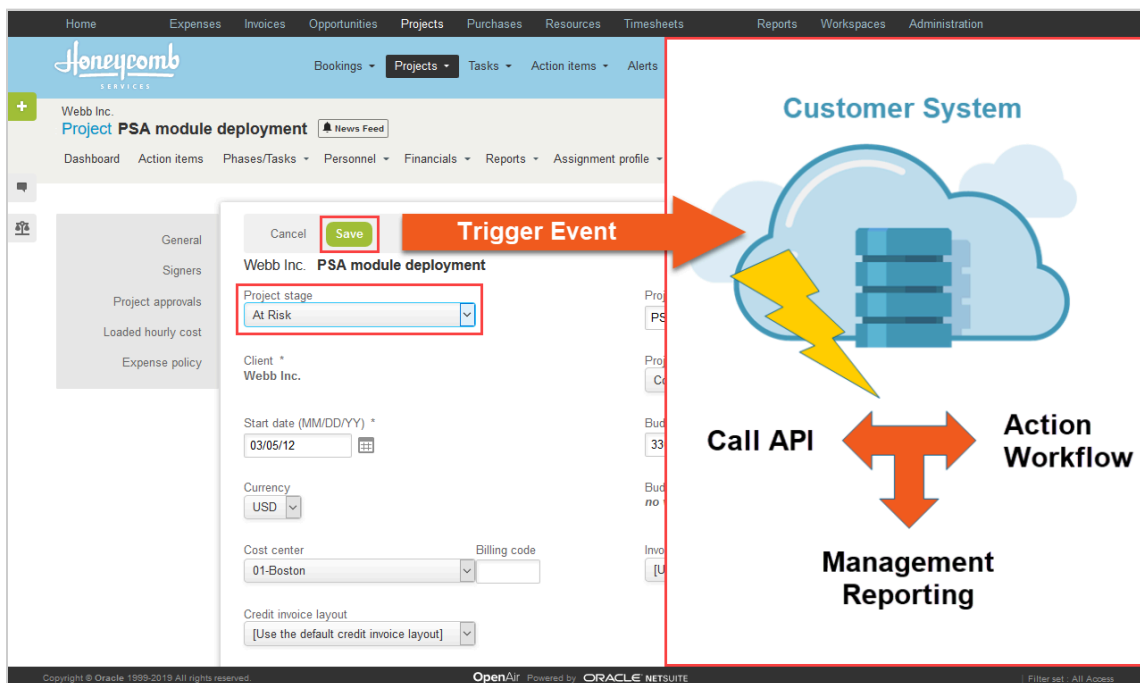
**Note:** To create user scripts in OpenAir, you need to be signed in as an administrator and be able to access the Scripting Center and Scripting Studio.

## Script Support for HTTPS Methods

This feature allows you to access NSOA.https functions for user scripting.

Integrate OpenAir with other online applications using outbound calls.

This feature allows you to access NSOA.https functions for user scripting and to execute workflow processes automatically from OpenAir across to other APIs, using form or scheduled scripts.



The feature includes:

- Five new NSOA functions supporting the HTTPS GET, POST, PUT, PATCH and DELETE request methods to read, send, update and delete data from/to external APIs.
- A new Password script parameter, allowing you to store encrypted credentials and use them in your scripts for secure deployment and maintenance.

Possible use cases include integration with Jira for agile development, Slack for team collaboration, Office 365 for notifications, or other external or bespoke APIs in your environment.

**Note:** To create user scripts in OpenAir, you need to be signed in as an administrator and be able to access the Scripting Center and Scripting Studio.

## User Scripting — Form Scripts

This feature lets you write user scripts in JavaScript programming language and associate them with trigger events on OpenAir forms. The scripts will be executed when users interact with the form (submit, save, approve) and can be executed either before or after the action itself. Form scripts are executed within the context of the authenticated user interacting with the form.

User scripting includes several predefined function to interact with OpenAir and the SOAP API.

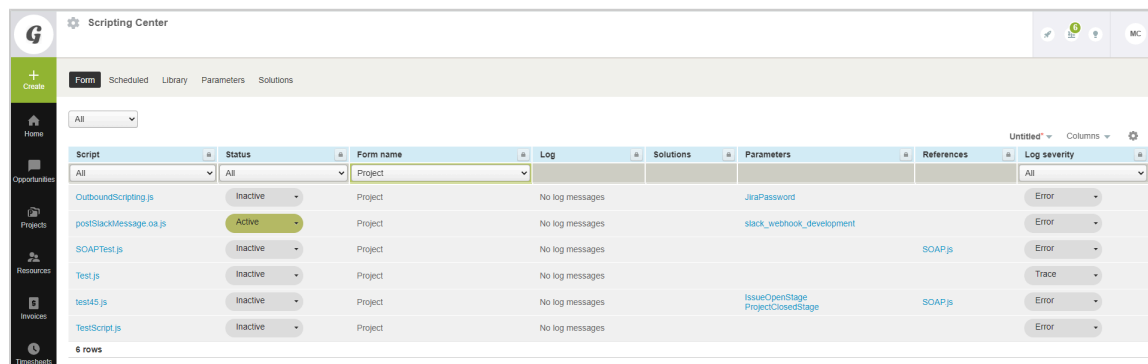
The feature automatically enables the following functionality:

- The **Scripting center** list view lets you access scripts and control all script deployments from a central location.
- The **Scripting studio** is a built-in script editor. You can use the scripting studio to create scripts, select the entrance function and trigger event, reference other scripts, and explore OpenAir functions and SOAP objects, and more.
- **Form script deployment logs** showing the status of all deployed form scripts (Reports > Details).

For more information about User Scripting, see [User Scripting](#).

A separate optional feature lets you write scripts that will be executed automatically according to a schedule. See [User Scripting — Scheduled Scripts](#).

To enable this feature, contact OpenAir Customer Support.



The screenshot shows the 'Scripting Center' interface with a sidebar on the left containing navigation links: Home, Opportunities, Projects, Resources, Invoices, and TimeSheet. The main content area has tabs for 'Form', 'Scheduled', 'Library', 'Parameters', and 'Solutions'. Below the tabs is a table with columns: Script, Status, Form name, Log, Solutions, Parameters, References, and Log severity. The table lists several scripts, including 'OutboundScripting.js', 'postSlackMessage.ox.js', 'SOAPTest.js', 'Test.js', 'test45.js', and 'TestScript.js'. The 'Status' column shows 'Inactive' for most and 'Active' for 'postSlackMessage.ox.js'. The 'Log severity' column shows 'Error' for most and 'Trace' for 'Test.js'.

Script	Status	Form name	Log	Solutions	Parameters	References	Log severity
OutboundScripting.js	Inactive	Project	No log messages		JiraPassword		Error
postSlackMessage.ox.js	Active	Project	No log messages		slack_webhook_development		Error
SOAPTest.js	Inactive	Project	No log messages			SOAP.js	Error
Test.js	Inactive	Project	No log messages				Trace
test45.js	Inactive	Project	No log messages		IssueOpenStage	SOAP.js	Error
TestScript.js	Inactive	Project	No log messages		ProjectClosedStage		Error

## User Scripting — Scheduled Scripts

This feature lets you write user scripts in JavaScript programming language that will be . Scheduled scripts are executed within the context of a specific user. When you deploy a scheduled script, you specify the

day and time when the script will be executed, and the user under whom the script will be executed. Scheduled scripts have higher governance limits than form scripts.

User scripting includes several predefined function to interact with OpenAir and the SOAP API.

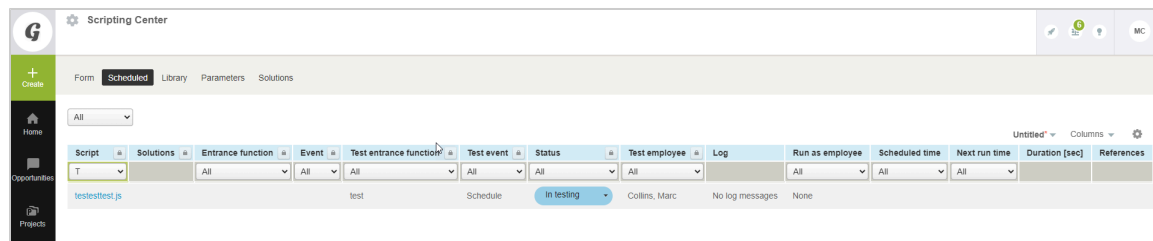
The feature automatically enables the following functionality:

- The **Scripting center** list view lets you access scripts and control all script deployments from a central location.
- The **Scripting studio** is a built-in script editor. You can use the scripting studio to create scripts, select the entrance function and trigger event, reference other scripts, and explore OpenAir functions and SOAP objects, and more.
- **Scheduled script deployment logs** showing the status of all deployed scheduled scripts (Reports > Details).

For more information about User Scripting, see [User Scripting](#).

A separate optional feature lets you write scripts that will be executed when users interacts with a specific OpenAir form. See [User Scripting — Form Scripts](#).

To enable this feature, contact OpenAir Customer Support.



The screenshot shows the 'Scripting Center' interface. At the top, there's a navigation bar with 'Form', 'Scheduled', 'Library', 'Parameters', and 'Solutions'. Below this is a table of scheduled scripts. The table has columns: Script, Solutions, Entrance function, Event, Test entrance function, Test event, Status, Test employee, Log, Run as employee, Scheduled time, Next run time, Duration (sec), and References. A single script is listed with the name 'testtesttest.js' and a status of 'In testing'.

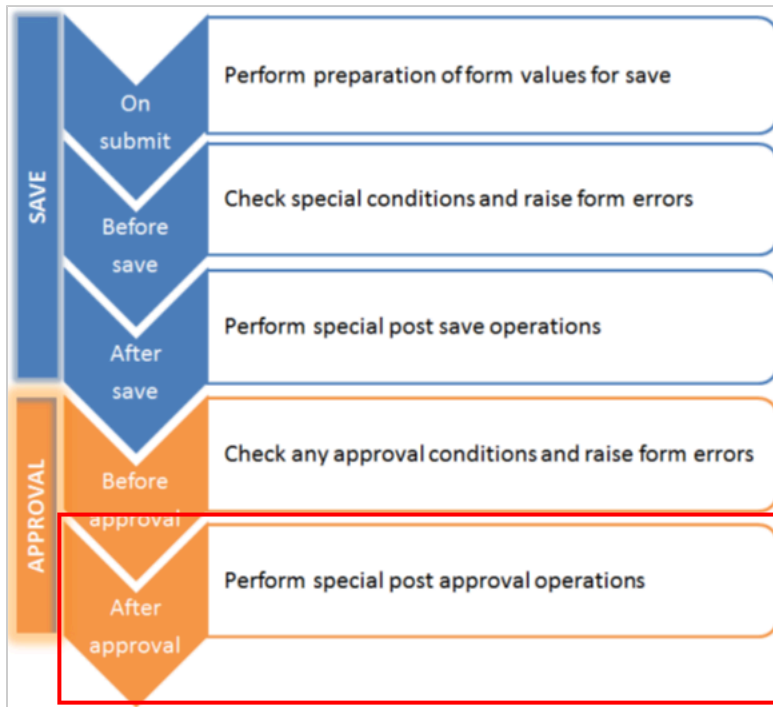
Script	Solutions	Entrance function	Event	Test entrance function	Test event	Status	Test employee	Log	Run as employee	Scheduled time	Next run time	Duration (sec)	References
testtesttest.js		All	All	All	All	All	All	No log messages	None	All	All		

## User Scripting — Unapprove Event

Create scripts which are triggered when the following are unapproved:

- Timesheets
- Schedule Requests
- Booking Requests
- Bookings
- Purchase Requests
- Purchase Orders
- Expense Reports
- Invoices





The format to use for when an “unapprove” argument is passed is:

```

1 function main(type) {
2     if (type == 'unapprove') {
3         // custom unapprove actions
4     }
5 }

```

To enable this feature, contact OpenAir Customer Support.

# NetSuite Connector

The following optional NetSuite Connector features are available in OpenAir. Some features require OpenAir Customer Support to enable them for you.

- [Loaded Cost Custom Import](#)
- [Multithreading Support for On-Demand and Real-Time Export](#)
- [Multithreading Support for the Main Integration](#)
- [NetSuite Connector Administration Form Editor Permission](#)
- [NetSuite Connector Settings History](#)
- [Prevent Saving NetSuite Connector Administration Form if Workflows are Scheduled or Set for Real-Time Integration](#)

## Loaded Cost Custom Import

This feature enables you to create a custom import workflows to import information from a NetSuite custom record type into OpenAir as loaded cost [loaded\_cost] records.

OpenAir NetSuite Connector lets you custom workflows to import data from NetSuite service items or custom record types into a supported record type in OpenAir using your own field mapping definitions. You can use a custom import workflow to import employee loaded cost information from a NetSuite custom record type into OpenAir as loaded cost records. For more information about Custom import workflows, see the help topic [Custom Import Workflows](#).

When you create a custom import workflow, you need to specify a custom field associated with the OpenAir record. OpenAir NetSuite Connector uses this custom field to store the internal ID of the corresponding NetSuite record. It is not possible to create custom fields for loaded cost records in OpenAir.

Enabling the Loaded Cost Custom Import optional feature creates a custom field associated with the Loaded Cost record type [loaded\_cost table]. The custom field name is netsuite\_loaded\_cost\_id.

After you enable the Loaded Cost Custom Import feature, you can create a custom import workflow to import loaded cost information into OpenAir from a custom record type in NetSuite. See the help topic [Importing Records from NetSuite into OpenAir Using Custom Workflows](#).

When creating the custom import workflow, use the following settings:

- **NetSuite record** – Select [Custom Record], and select the NetSuite custom record type holding employee loaded cost information from the **Specify** dropdown.



**Tip:** Click **Synchronize** to update the list of NetSuite custom record types without leaving the custom import workflow configuration form.

- **OpenAir record** – Select Loaded cost.
- **ID field** – Select netsuite\_loaded\_cost\_id\_\_c

**Note:** Employee loaded cost information must be sourced from a custom record type in NetSuite. If loaded cost information is entered on the employee record in NetSuite, for example, additional customization is required to copy this information automatically to the relevant custom records so that it can be imported into OpenAir. For more information about creating custom record types in NetSuite, see [Creating Custom Record Types \(External link to NetSuite SuiteAnswers | Answer ID: 10140\)](#).

The `netsuite_loaded_cost_id` custom field is not visible on the OpenAir UI.

- To view the NetSuite internal ID for an imported loaded cost record, export the `loaded_cost` table using the Import/Export functionality in OpenAir. For more information about the Import/Export functionality, see [Administrator Guide](#).
- To set the NetSuite internal ID for an existing loaded cost record, you need to use the OpenAir XML API, OpenAir SOAP API, or OpenAir Integrations Manager. As with all import workflows, if you have existing loaded cost records in OpenAir, you should ensure that loaded cost custom imports do not create duplicate entries in OpenAir. Setting the NetSuite internal ID for existing records is one way of doing so.

To enable this feature, contact OpenAir Customer Support.

## Multithreading Support for On-Demand and Real-Time Export


Control how many threads the NetSuite Connector uses for integrations with SuiteCloud Plus.


If you have an active NetSuite SuiteCloud Plus license, you can enable multithreading support for on-demand and real-time export. You can request the maximum number of threads you want to allocate for the OpenAir <> NetSuite integration.

- The value is set to 10 concurrent threads by default.
- You can request any maximum number of threads between 1 and 10.

After this feature is enabled, NetSuite Connector uses any available threads concurrently for the **real-time export** of records from OpenAir to NetSuite.

To enable multithreading support for on-demand and real-time export, contact OpenAir Customer Support.

 **Note:** You can also control the number of threads used to export records as part of the main integration. For more information, see [Multithreading Support for the Main Integration](#).

 **Important:** To enable multithreading support, you must have an active NetSuite SuiteCloud Plus license. NetSuite SuiteCloud Plus allows up to 10 threads to be allocated concurrently for communication with NetSuite web services.

If you do not have an active NetSuite SuiteCloud Plus, the OpenAir NetSuite integration is limited to a single thread communication with NetSuite web services at all time.

## Multithreading Support for the Main Integration


Increase throughput by enabling the main integration to use multiple threads concurrently.

OpenAir NetSuite Connector can use multiple threads to export records from OpenAir to NetSuite as part of main integration runs.

To enable multithreading support for the main integration, contact OpenAir Customer Support.

- Up to 10 threads can be allocated for main integration runs.
- Multithreading is supported only for export from OpenAir to NetSuite and not for import from NetSuite to OpenAir.

To enable multithreading support for the main integration, contact OpenAir Customer Support.

 **Important:** To enable multithreading support, you must have an active NetSuite SuiteCloud Plus license. NetSuite SuiteCloud Plus allows up to 10 threads to be allocated concurrently for communication with NetSuite web services.

If you do not have an active NetSuite SuiteCloud Plus, the OpenAir NetSuite integration is limited to a single thread communication with NetSuite web services at all time.

## NetSuite Connector Administration Form Editor Permission

Account administrators with the relevant privilege can now save changes to the NetSuite Connector administration form without a password.

### To let an account administrator edit settings on the NetSuite Connector administration form:

1. Contact OpenAir Customer Support and request the NetSuite Connector Administration Form Editor Permission optional feature.
2. In OpenAir, go to Administration > Global settings > Users > Employees > *[Select an employee]* > Demographic.
3. Check the **View and edit NetSuite Connector administration form** box under the Optional features section. This employee demographic setting is not available if the employee is not an administrator, even if the employee has the “View and edit integration settings” role permission.
4. Click **Save**.

By default, the Save button is disabled if there are any active scheduled or real-time integrations configured for your account. To make changes to the NetSuite Connector Administration form, first deactivate all scheduled and real-time integrations. To keep the Save button enabled at all time for authorized account administrators, check the “Do not prevent save on the NetSuite Connector administration form” box.



**Important:** Make sure you read the documentation and consider changes carefully before you save the NetSuite Connector administration form. The integration may stop working, or may not work as expected and cause data corruption if configured incorrectly.

## NetSuite Connector Settings History


View the history of integration configuration changes using the OpenAir NetSuite Connector Settings History page.

To view the NetSuite Connector Settings History page, go to Administration > NetSuite Connector, click the Tips menu, then **View history settings**.

The history settings page opens in a new browser tab or window. It uses the redesigned user experience list view layout and features. The list shows audit trail information transformed for better readability.



**Note:** A simple change can create multiple rows in the settings history. For example, adding a workflow to the list of workflows also adds rows changes for all the mapping groups and mapping definition rows created when adding this workflow.

The audit trail information shown on the NetSuite Connector Settings History in this OpenAir release is not fully optimized for readability and will be refined in a future release. For more information about reading the settings history list view, see  [NetSuite Integration](#).

The list view can include the following columns

- Name of the **Employee** who made the change.
- Name of the **Proxy Employee** — The name of the employee who made the change while signed in by proxy as the **Employee**.
- **Section** of the NetSuite Connector UI where the changes was made — The different sections correspond to the different tab on the New NetSuite Connector UI (Credentials, Automate, Real-time, Mapping), to a specific feature (Workflow group and Workflow group assignment), or to the NetSuite Connector administration and workflow settings forms(NetSuite Connector Administration).
- **Category** of the setting changed — Settings are grouped into categories that give additional information to help identify what was changed.
- The values in the **Tab** column shows the integration workflow and mapping group impacted by changes made to field mapping definitions.
- Internal **ID** of the **Setting** changed.
- **Description** of the **Setting** changed — Additional information to help identify what was changed.
- **Action** performed — Values include: Created, Updated, Deleted.
- **Date** the change was made.
- **Original value** before the change.
- **New value** after the change.
- **Change made via** — How the change was made. For example, the change could be made using the OpenAir NetSuite Connector UI, by importing settings from a file.

To enable the NetSuite Connector Settings History feature, contact OpenAir Customer Support.

NetSuite Connector settings history | [Close](#)

NetSuite Connector Settings History

Untitled ▾

To load list views faster, use advanced filters. You can save your filter criteria for later use.

Employee	Section	Category	Setting Description	Action	Date	Original value	New value
All ▾	All ▾	All ▾		All ▾	All ▾	All ▾	All ▾
Collins, Marc	Mapping	OpenAir field	OpenAir field 'Purchase_ite...	Created	09/07/21 04:27 AM		Purchase_item.date
Collins, Marc	Real-time	Active realtime row	on	Created	09/07/21 04:27 AM		1
Collins, Marc	Credentials	Value of the settings	TBA User Token ID	Updated	09/07/21 04:37 AM	c60429baa41...	85bfa8d4a464a9c74db31fc1bda3ab2c9871af5...
Collins, Marc	Credentials	Value of the settings	TBA User Token secret	Updated	09/07/21 04:37 AM	[changed]	[changed]
Collins, Marc	Credentials	Value of the settings	Integration user	Updated	09/07/21 04:37 AM		Collins, Marc
Collins, Marc	NetSuite Connector Administration	Value of the switch	Verify invoice export	Updated	09/07/21 04:38 AM		1
Collins, Marc	NetSuite Connector Administration	Value of the switch	Loaded Cost (Custom Rec...	Updated	09/07/21 04:38 AM	1	
Collins, Marc	Workflow group	Workflow group name	All Exports	Created	09/07/21 04:39 AM		All Exports
Collins, Marc	Workflow group assignment	Active workflow group assignment	'All Exports' contains 'Reco...	Created	09/07/21 04:39 AM		1
Collins, Marc	Workflow group assignment	Active workflow group assignment	'All Exports' contains 'Expe...	Created	09/07/21 04:39 AM		1

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## Prevent Saving NetSuite Connector Administration Form if Workflows are Scheduled or Set for Real-Time Integration

This optional feature disables the Save button on the NetSuite Connector administration form if there are any active scheduled or real-time integrations configured for your account. This forces authorized account administrators to deactivate all scheduled and real-time integrations before they can make any changes to the NetSuite Connector administration form.

This feature provides additional protection on top of other form validation in place to avoid common errors when editing the NetSuite Connector administration settings.

To enable this feature, contact OpenAir Customer Support.

# Workspaces

The following Workspaces Security features are available in OpenAir.

- [Documents Bulk Deletion on Download](#)
- [Download All Documents Across All WorkSpaces](#)

## Documents Bulk Deletion on Download

This feature lets account administrators and users with the relevant role permission delete all documents from a workspace at the same time.

Account administrators control who can access that page using the following role permissions:

**Download all documents** and **Delete all documents**.

### To delete all documents in a workspace:

1. Go to Workspaces > [*Select a workspace*].
2. Click **Download all documents**.  
The Download all documents form appears
3. Check the **Delete all documents** box to delete the documents from OpenAir after downloading them.

To enable this feature, contact OpenAir Customer Support.

## Download All Documents Across All WorkSpaces

This feature lets account administrators and users with the relevant role permission download all documents across all workspaces from Administration > Application Settings > Workspaces > Download all documents.

Account administrators control who can access that page using the following role permission: Download all documents in all workspaces.

To enable this feature, contact OpenAir Customer Support.

# Security

The following optional Security features are available in OpenAir.

- [IP Restriction](#)
- [Password Security Questions](#)
- [Password Validation Against Known Compromised Passwords](#)
- [PI Removal](#)

## IP Restriction

Specify which IP addresses are authorized to access your OpenAir account. This includes access to your OpenAir account using the OpenAir UI, the OpenAir API, or any client application utilizing the API to exchange information with your OpenAir account.

This optional feature lets you store authorized IP addresses on the employee record for each user. You can allow single IP addresses or network ranges, using an explicit range or subnet mask. The IP Restriction feature may be used to ensure users can only access your OpenAir account if they are connected to your company's physical network or VPN, for example.

## Feature Extensions

- **IP Restriction Check for IP Change** — You can extend the IP Restriction feature to check for IP address changes with every API request. In this case, if the IP address of the authenticated user's device changes and the new IP address is not in the IP address allowlist for this user, API requests return an error, and client applications utilizing the API can no longer exchange information with your OpenAir account. If the client applications utilizes the OAuth 2.0 authorization framework to connect to OpenAir, the OAuth 2.0 access and refresh tokens become invalid.

If the IP address of the authenticated user's device changes and the new IP address is not in the IP address allowlist for this user, the user can continue using the OpenAir UI normally until the user signs out or the session times out. This is true whether the user is accessing the OpenAir UI as a standalone application, or within NetSuite using the Single Sign-On integration feature.



**Note:** Client applications utilizing OpenAir API include:

- OpenAir Mobile.
- Other add-on services supplied by OpenAir (Integration Manager, Exchange Integration Manager, Projects Connector, Outlook Connector, OffLine).
- Any bespoke integration utilizing the REST API, SOAP API, or XML API.

To enable this feature the IP Restriction or the IP Restriction Check for IP Change, contact OpenAir Customer Support. Additional setup is required for the IP restriction feature — for more information, see



[Security](#).

## Password Security Questions

Security questions are used to verify the identity of a user to reset a password and regain access to OpenAir.



After this optional feature is enabled, new account users must set up security questions the first time they sign in to OpenAir and existing account users must set up security questions when they change your password.

After a user sets up security questions in OpenAir they can reset their password or unlock their user account without the intervention of an account administrator. To reset a password or unlock a user account, the user can click the **Reset password or unlock account** link on the OpenAir sign-in page and enter their Company ID, User ID and email address. If these details are verified, the user must answer a security challenge. If all questions are answered correctly, OpenAir sends a temporary password to the user's email address.

This feature reduces some of the administrative burden associated with unlocking user accounts.

For more information about using the Password Security Questions feature, see the help topics [Setting Up Security Questions](#) and [Resetting Your OpenAir Password](#).



**Note:** Review the following guidelines:

- If you require answers to the security questions to have a minimum lengths, ask OpenAir Customer Support to change the minimum number of characters each answer must contain.
- System emails are disabled by default on sandbox accounts. The **Forgot your password or ID?** and **Reset password or unlock account** links can only be used on production accounts.

To enable this feature, contact OpenAir Customer Support.

## Password Validation Against Known Compromised Passwords

Validate new passwords against a list of known compromised passwords when an employee attempts to change password.

When this optional feature is enabled for your account, OpenAir validates new passwords against a list of compromised passwords and will require users to enter a different password if the new password is on a regularly updated list of known compromised passwords.



**Note:** This is not applicable for temporary passwords set by administrators.

To enable this feature, contact OpenAir Customer Support.

The screenshot shows the OpenAir user interface. On the left is a sidebar with icons for 'Create', 'Home', and 'Opportunities'. The main content area is titled 'Password'. It contains two input fields: 'Password <sup>1</sup>' and 'Confirm password \*'. The 'Password' field has a red border and a red error message below it: '<sup>1</sup> The password you have entered was detected on a list of known compromised passwords. Please enter a different password.' The 'Confirm password' field is empty.

## PI Removal

Let authorized OpenAir users request and process the removal of personally identifiable information (PII) from employee, contact and customer records in OpenAir

Personally identifiable information (PII) is data that can be used to determine a person's identity. Rules and regulations about PII vary by country, but usually include strict guidelines covering personal information acquisition, storage, and removal. The right to be forgotten is one of the key requirements in recent privacy laws, including in General Data Protection Regulation (GDPR). Administrators can use the PI Removal feature to replace the data stored in OpenAir with a standard value depending on the field type.

The PI Removal feature:

- Remove personal information (PI) from relevant standard, custom, and audit trail fields. See [Supported Field Types and Fields](#).
- Improves compliance with privacy regulation.
- Permits an authorized user to remove personal information without contacting OpenAir Customer Support.

You can create, submit, and approve individual PI removal requests from within OpenAir. You can view all the requests that have been submitted, including who created the request, when it was created, and the current status of the request. See [Reviewing, Creating, Submitting, Approving, Rejecting, or Canceling a PII Redaction Requests](#).

Submitted PI removal requests must be approved before they are queued for processing. OpenAir processes approved PI removal request automatically on a set day and time each week. PI removal requests approved in the last 72 hours at the time of processing are not processed immediately but the following week. This allows a minimum of 72 hours to cancel an approved PI removal request, should it be required.

After a PI removal request is processed, the PII is redacted permanently from OpenAir and the status of the PI removal request shows as completed. Users with the appropriate privileges can cancel the request at any time before its status shows as completed.

Email notifications are sent to users with the relevant access privilege. Employees who can approve PI removal requests receive an email notification when a request is submitted. Employees who can either create or approve PI removal requests receive an email notification when a request is approved, rejected, or canceled.

To enable this feature, contact OpenAir Customer Support.

## User Privileges

The following user privileges are available for PI Removal feature:

- **Allow employee to create PI removal requests** – User can view, create, edit, submit, duplicate and cancel requests.
- **Allow employee to approve PI removal requests** – User can view, approve or reject, and cancel requests.

Account administrators who do not have either of these user privileges can view and cancel PI removal requests.

**Note:** By default, PI removal requests must be submitted and approved by different employees.

You should designate at least two employees to use the PI removal feature so that requests are created and approved by different employees.

You can allow the same employee to create and approve a PI removal request. To do so, contact OpenAir Customer Support and request the **PII Redaction – Cumulative Create and Approve Privileges** feature extension.

## Supported Field Types and Fields

The PI Removal feature supports removal of information for the following field types. All redacted values are replaced with "\*\*\*\*\*", except where indicated otherwise in the following list.

- Audit trail – Redacted value replaced by "PI Redacted by user.id <userId>" where <userId> is the OpenAir internal ID for the employee who submitted the PI removal request.

**Note:** When the PI removal request is processed, OpenAir redacts only the audit trail information for the standard and custom fields that are redacted as part of the same PI removal request.

- Date – Redacted value replaced by "1900-01-01"
- Datetime – Redacted value replaced by "1900-01-01 00:00:00"
- Numeric – Redacted value replaced by "0"
- Password (such as security answers, for example, if the Password Security Questions feature is enabled for your account – see [Password Security Questions](#))
- Text
- Text area
- URL

Information in both standard and custom fields can be redacted. The following table lists the record types and fields you can remove information from.

Record Type	Standard Fields	Custom Field Types	Audit trail [audit]
Contact	Email [email], exported, Fax [fax], First name [first], Job title [job_title], Last name [last], Mobile [mobile], Nickname [name], Notes [notes], Phone [phone], Title [salutation]	Date, Numeric, Text, Text area, URL	✓
Customer	Address [address1, address2, address3, address4], City [city], Company name [company], Country [country], Email [email], Fax [fax], Email invoice text [invoice_email_text], Invoice prefix [invoice_prefix], Invoice note [invoice_text], Nickname [name], Notes [notes], Phone [phone], Rate [rate], State/Province [state], Payment terms [terms], Web address [web], ZIP/Postal code [zip]	Date, Numeric, Text, Text area, URL	✓
User (Employee or Guest)	Address [address1, address2, address3, address4], City [city], Country [country],	Date, Numeric, Text, Text area, URL	✓

Record Type	Standard Fields	Custom Field Types	Audit trail [audit]
	Email [email], Fax [fax], First name [first], Password hint [hint], Last name [last], Middle name [middle], Mobile [mobile], Employee [name], Employee ID [nickname], Phone [phone], Rate [rate], Title [salutation], Security answer 1 [security_answer1], Security answer 2 [security_answer2], Security answer 3 [security_answer3], State/Province [state], ZIP/Postal code [zip]		

## Reviewing, Creating, Submitting, Approving, Rejecting, or Canceling a PII Redaction Requests

If the PI Removal feature is enabled for your OpenAir account, depending on your user privileges, you can review, create, submit, approve, reject, or cancel personally identifiable information (PII) redaction requests.

### To review, create, submit, approve, reject, or cancel a PI removal request

1. Go to Administration > Global Settings > Organization > PII Removal (Administrator).

For each request, you can see the PI removal request name, the record type, when it was created, who created the request, who approved it, and the request status. The request status can be Open (request created but not submitted for approval), Submitted, Approved, Rejected, Terminated (approved request subsequently canceled), or Completed (request processed and information removed).

Global Settings - Organization							
Account - Custom Fields Customers - Display - Jobs, Rates - <b>Organization</b> - More -				6 10 MC			
+ Create		PI Removal		Untitled* 10			
Actions	PI Removal name	Approval status	Record type	Created	Created by	Approved by	Completed
	Copy of John Smith	Open	contact	22-Dec-21	Collins, Marc		
	Jan Doring	Approved	user	22-Oct-13	Admin, Jim	Admin, Jim	
	John Smith	Open	contact	22-Dec-21	Collins, Marc		

2. To view the details of each request, click the PI removal request name or the Edit icon under the Actions column. On the PI removal request form, you can see which records, and fields were, or are yet to be removed, and the redaction request includes the audit trail. If the request was not submitted, you can edit the request details.
3. To create a new PI removal request, click the Create button then **New PI removal request**.  
A form appears.
4. Select the type of record you want to redact information from, then click **Continue**.  
The PI removal request form appears.

**PI Removals**

New PI Removal Request - user **Right To Be Forgotten Request #MC202303**

Cancel **Save & Submit** **Save**

PI Removal name \*

Right To Be Forgotten Request #MC202303

Record to remove PI \*

[2] Collins, Marc

**Fields in which to remove PI**

city  
country  
email  
fax  
first


email  
first  
last  
middle  
mobile

Add selected > < Remove selected

Redact audit ☒

**NOTE:** Once you save and submit a PI Removal request, you cannot edit it further.

Cancel **Save & Submit** **Save**

- a. Enter a **PI removal request name**.
  - b. Select the **Record** to redact information from.  
The dropdown lists records identified by their OpenAir internal ID in square brackets, followed by their Name (Employee records) or Nickname (Contacts and Customers).
  - c. Select the **Fields** containing the information to be redacted. You can select multiple fields to be redacted at the same time.
  - d. Check the **Redact audit trail** box if you want to redact the audit trail information.
  - e. Click **Save** or **Save and Submit**. You cannot edit a PI removal request after you submit it.
5. To make a copy of a PI removal request, click the Clone icon  under the Actions column, change details as required on the PI removal request form, then click **Save** or **Save and Submit**.
  6. To approve or reject a submitted PI removal request, click the PI removal request name then click **Approve** or **Reject**.
  7. To cancel an approved PI removal request, go to the PI removal request and click **Terminate**. Canceled PI removal requests cannot be modified or resubmitted. To redact PII for the same record, create and submit a new PI removal request.

# Release History

This section lists the features described under Optional Features by the feature release date.



**Tip:** Use this list to identify the features that have been released since your last update.

## April 13, 2024



- Added [Proxy Approver Notifications](#) — Existing feature newly documented in this guide (available since September 18, 2010).
- Expanded [Loaded Cost Custom Import](#) with additional information and cross-references.
- Moved **Use Account-Specific Domain** under the Administrator Guide. Account-specific domain are used for all OpenAir accounts since February 2020 and must be used to connect to all OpenAir services since 2023.1 – See the help topic [Your OpenAir Account URLs](#).
- Deleted **OpenAir Within NetSuite and Real-Time Record Import Using OAuth 2.0** – Changed to an OpenAir NetSuite Connector administration setting [Use OAuth 2.0 for NetSuite Single Sign-On Integration and Real-Time Record Import](#).

## October 7, 2023

- Added [Access All Tasks](#) — Existing feature newly documented in this guide (available since June 11, 2005).
- Added [All Item Types in Calendar](#) — Existing feature newly documented in this guide (available since October 7, 2006).
- Added [Custom Fields for Projects as Columns on Charges List Views](#) — Add columns for custom fields associated with project records to charges list views.
- Added **OpenAir Within NetSuite and Real-Time Record Import Using OAuth 2.0** — Use the NetSuite as OIDC Provider feature to access OpenAir from within the NetSuite UI and to allow real-time record import from NetSuite into OpenAir. Changed to an OpenAir NetSuite Connector administration setting – See the help topic [Use OAuth 2.0 for NetSuite Single Sign-On Integration and Real-Time Record Import](#).
- Added [Stricter Permission Control for Extended Fields Derived from Employee Cost Information](#) — Extend standard access control for extended fields and custom calculations derived from employee cost information.
- Updated [Attachment Viewer and Attachment Thumbnail](#) — Preview PDF attachment files, view attachment thumbnails and preview attachment files from expenses list views, click a thumbnail in the attachment viewer navigation bar to view the attachment file in the preview pane.
- Updated [Inline-Editing in List Views](#) — Use inline-editing in projects and saved reports list views. The topic is now located under [Global](#).
- Expanded [Close a Task for a Specific Employee for Timesheets and Expenses](#) with additional information about the feature and compatibility guidelines.
- Expanded [Exclude Project from Charge Projections](#) with additional information about feature implementation.

## April 15, 2023

- Added [Attachment Viewer and Attachment Thumbnail](#) — View attachments directly from the UI and view autogenerated thumbnail images for each attachment on selected forms and list views.


- Added [Loaded Cost Custom Import](#) — Create custom import workflows for employee loaded costs in OpenAir NetSuite Connector.
- Added [PI Removal](#) — Let authorized OpenAir users request and process the removal of personally identifiable information (PII) for employee, guest user, contact and customer records from OpenAir records, fields, and audit trails.
- Added [Quick Audit Trail for Global Settings](#) — Existing feature newly documented in this guide (available since January 17, 2009).
- Updated ["Assigned to" Column Filter in Tasks List View](#) — Feature behavior was changed.
- Updated [IP Restriction](#) — Extend the IP Restriction feature to check for IP changes with every API request.
- Updated [Single Sign-On Integration Leveraging SAML](#) — Added note about the upcoming "Legacy profile" end of support.
- Updated [Quick Audit Trail for Custom Fields](#) — Renamed feature (was: View Audit Information for Custom Fields in Table Format on Forms) and added information about Custom Field Extended Audit feature extension.
- Deleted **Self-Service SAML Identity Provider Profile Configuration** — Now available as standard when the [Single Sign-On Integration Leveraging SAML](#) is enabled. Added note about the upcoming "Legacy profile" end of support.
- Deleted **New NetSuite Connector UI** — Available as standard when the OpenAir NetSuite Connector is enabled.
- Deleted **QuickViews for Bookings, QuickViews for Employees, QuickViews for Projects, QuickViews for Tasks** — Administrators can enable QuickViews in the Administration module. See  [User Guide](#) and  [Administrator Guide](#).

## October 8, 2022


- Added ["Assigned to" Column Filter in Tasks List View](#) — Column filters for the **Assigned to** in the Project > Tasks list view
- Added [Product Updates Panel](#) — New release highlights and other product updates accessible from the OpenAir UI.
- Added **Self-Service SAML Identity Provider Profile Configuration** — Support for multiple identity provider configuration managed by account administrators.
- Added [Task on Purchase Requests](#) — Existing feature newly documented in this guide (available since October 17, 2015).
- Deleted **Redesigned OpenAir User Experience** — The redesigned user experience is enabled for all accounts.
- Deleted **Redesigned OpenAir User Experience Phase 1 (Deprecated)** — The redesigned user experience is enabled for all accounts.
- Deleted **Redesigned OpenAir User Experience Phase 2 (Deprecated)** — The redesigned user experience is enabled for all accounts.

## April 9, 2022












- Added [Redesigned Advanced Filters](#) — Gain usability and canvas space when viewing, modifying or managing advanced filters.




- Updated [Project Center](#), previously available as **Project Center Outline View (Redesigned User Experience)** — All project center functionality is now available as part of the Project Center optional feature.
- Added [Documents Bulk Deletion on Download](#) — Existing feature newly documented in this guide (available since June 10, 2004).
- Added [Download All Documents Across All WorkSpaces](#) — Existing feature newly documented in this guide (available since December 16, 2006).
- Added [IP Restriction](#) — Existing feature newly documented in this guide (available since November 22, 2008).
- Added [Password Security Questions](#) — Existing feature newly documented in this guide (available since May 15, 2010).
- Added [Password Validation Against Known Compromised Passwords](#) — Validate new passwords against a list of known compromised passwords when an employee attempts to change password.
- Deleted **Project Center Booking Worksheet (Redesigned User Experience)** — All project center functionality is now available as part of [Project Center](#).
- Deleted **Real-Time Import Validation** — The feature is now default behavior. See  [NetSuite Integration](#).

## October 9, 2021

- Added **Real-Time Import Validation** — Prevent the creation of duplicate records in OpenAir when importing a record from NetSuite to OpenAir using the real-time integration.
- Added [Restrict Project Recalculation to Tasks Impacted by the Changes on the Project Outline, Gantt and Task Detail View](#) — Improve the performance of the project outline, Gantt and task detail view by restricting project recalculation to tasks that are impacted by the changes.
- Added [Restrict Utilization Recalculation to Resources Impacted by the Changes on the Advanced Booking Worksheet](#) — Improve the performance of the advanced booking worksheet by restricting utilization recalculation to resources that are impacted by the changes.
- Added [NetSuite Connector Settings History](#) — View the history of integration configuration changes using the OpenAir NetSuite Connector Settings History page.
- Updated [Attachment File Drag and Drop](#) — Added bulk delete and bulk attach actions, as well as support for dragging folders to attach all files within.
- Updated [Feature-Specific User Satisfaction Feedback Form](#) — User feedback is also gathered for the following Redesigned OpenAir User Experience features:
  - Create button and Create New menu
  - Redesigned list views and list view toolbar
- Added [Automatic Backup Service](#) — Existing feature newly documented in this guide.
- Added [Multicurrency](#) — Existing feature newly documented in this guide.
- Renamed and moved [Prioritize Recorded Time Over Booked Time for Charge and Revenue Recognition Projection](#) under Projects (was “Revenue Recognition Projections Prioritize Logged Time Over Booked Time” under Invoices).
- Revised [Portfolio Projects and Subordinate Projects](#) and added a separate entry for [Single Billing Cap Across Multiple Subprojects Within a Portfolio Project](#) — Revised content and additional information about these separate features, previously described under the same heading **Create Portfolio and Sub Projects and Share Billing Rule Caps across Multiple Projects**.
- Deleted **Automatic Backup Service Confirmation on File Transfer Completion** — Configuration option available by default when the Automatic Backup Service is enabled. For more information, see  [Administrator Guide](#).












- Deleted **Automatic Backup Service (ABS) MySQL Import File “Apply Relationships” Option** — Configuration option available by default when the Automatic Backup Service is enabled. For more information, see  [Administrator Guide](#).
- Deleted **Automatic Backup Service (ABS) MySQL Import File UTF-8 Option** — Configuration option available by default when the Automatic Backup Service is enabled. For more information, see  [Administrator Guide](#).
- Deleted **Automatic Backup Service (ABS) Passive Mode Option for FTPS Transfers** — The FTPS protocol in the Automatic Backup Service is no longer supported with effect from January 20, 2021.
- Deleted **Color-Coding on Actual versus Planned View** — This functionality is part of the [Project Budget](#) feature.
- Deleted **Compare Budgets** — This functionality is part of the [Project Budget](#) feature.
- Deleted **Contact Information Fields on Tabular and Crosstabbed Reports and List Views** — This functionality is part of the [Customer Contact Information in Project Properties](#) feature.
- Deleted **Custom Booking Approvals Notifications** — The functionality is part of the [Custom Email Notifications](#) optional feature.
- Deleted **Custom Form Layouts** — The feature is available by default. For more information, see .
- Deleted **Customizable Skill Level Descriptions** — The feature is available by default when the Resources module is enabled. For more information, see  [Administrator Guide](#).
- Deleted **Customization Center** — The feature is available by default. For more information, see  [Administrator Guide](#).
- Deleted **Customize Resource Compare View Header** — The feature is available by default when the Resources module is enabled. For more information, see  [Administrator Guide](#).
- Deleted **Display Payroll Type Field on Time Entries List View** — The feature is available by default.
- Deleted **Edit Resource Demand Requests After Submittal** — The functionality is available by default when the following features are enabled: [Resource Demand Request](#) and [Enable a Booking Type to Exist in All Approval Statuses](#).
- Deleted **Export XSD Schema Files** — The feature is available by default. For more information, see  [Administrator Guide](#).
- Deleted **Extended Project Assignment Profile Option** — The functionality is available by default when the following features are enabled: [Project Assignment Profiles](#) and [Automated Search Engine for Booking Creation](#).
- Deleted **Generate Account Specific WSDL** — The feature is available by default. For more information, see  [Administrator Guide](#).
- Deleted **Ignore Booked Hours If Worked or Approved Hours Are Logged** — Duplicate of [Prioritize Recorded Time Over Booked Time for Charge and Revenue Recognition Projection](#).
- Deleted **Include “Time Entry Payroll Type” in Invoices** — The feature is available by default. You can set up invoice layouts to add the time entry payroll type column or group time entries by payroll type. See  [Administrator Guide](#).
- Deleted **Next-Generation Report Editor** — The feature is part of the [Report Manager and Editor](#) feature.
- Deleted **OpenAir Help Center** — This feature is enabled by default with effect from October 9, 2021. For more information, see  [Administrator Guide](#).
- Deleted **Performance Console** — The feature is available by default. For more information, see  [Administrator Guide](#).
- Deleted **Prevent Deletion of Users Assigned to Tasks with Logged Hours** — The feature is available by default . For more information, see  [Administrator Guide](#).

- Deleted **QuickView Customization Options** — Configuration option available by default when any of the QuickViews optional features are enabled.
- Deleted **Resource Demand Request “Essential” Category for Search Base Criteria** — The feature is enabled by default when [Resource Demand Request](#) is enabled. For more information, see  [Administrator Guide](#).
- Deleted **Resource Icons on the Outline and Gantt View** — The functionality is part of the [User-Level Outline View](#) feature.
- Deleted **Restricted Skills in Consolidated Resource Profile** — This functionality is part of the [Resource Profile Type Access Control](#) feature.
- Deleted **Script Deployment Logs** — The functionality is available by default when one of the following features is enabled: [User Scripting — Form Scripts](#) or [User Scripting — Scheduled Scripts](#).
- Deleted **Scripting Center** — The functionality is available by default when one of the following features is enabled: [User Scripting — Form Scripts](#) or [User Scripting — Scheduled Scripts](#).
- Deleted **Scripting Studio** — The functionality is available by default when one of the following features is enabled: [User Scripting — Form Scripts](#) or [User Scripting — Scheduled Scripts](#).
- Deleted **Select Period for Attachments Backup in Automatic Backup System (ABS)** — Configuration option available by default when the Automatic Backup Service is enabled. For more information, see  [Administrator Guide](#).
- Deleted **Set Credit Invoice Date When Creating Invoices for Credit/Rebill** — This functionality is part of the [Credit and Rebill Functionality for Invoices](#) feature.
- Deleted **Streamlined Budget Approvals** - This functionality is part of the [Project Budget](#) feature.
- Deleted **Update Time Entries Based on Booking Types** — This is a Timesheets application setting. See  [Administrator Guide](#).
- Deleted **User Scripting** — The functionality is part of the [User Scripting — Form Scripts](#) and [User Scripting — Scheduled Scripts](#) features.
- Deleted **Verify Password Change** — Users are now required to provide their current password when changing password by default.

## April 10, 2021

- Added [Allow employees with appropriate permissions to add project based items when they do not have permission to modify the project](#).
- Added [Attachment File Drag and Drop](#).
- Added [NetSuite Connector Administration Form Editor Permission](#).
- Added [Prevent Saving NetSuite Connector Administration Form if Workflows are Scheduled or Set for Real-Time Integration](#).
- Added [Extended Character Set Support for List View Sorting and Filtering](#) — Existing feature newly documented in this guide.
- Updated [Feature-Specific User Satisfaction Feedback Form](#) — User feedback is also gathered for the project center, the outline, Gantt and task detail view, the Expenses module, and the receipt attachments user interface.
- Updated [Multithreading Support for the Main Integration](#) — Up to 10 threads can be allocated for main integration runs.
- Updated [Redesigned Administration Module](#) — Now enabled by default.
- Updated [Redesigned OpenAir User Experience Phase 1](#) — Deprecated.
- Updated [Redesigned OpenAir User Experience Phase 2](#) — Deprecated.

- Updated Redesigned OpenAir User Experience — Now enabled by default.
- Updated [Wrap Text in List View Cells](#) — The feature now supports line feeds. Display options for long text cell do not impact the **description** column in the billing and recognition rules list views.
- Removed **Enforce Column Filter Value Search (Redesigned User Experience)** — superseded by a built-in feature. For more information, see  [User Guide](#).
- Removed **High-Frequency Real-Time Support** — Built-in OpenAir NetSuite Connector feature. For more information, see  [NetSuite Integration](#).
- Removed **Import Taxes Applied to Exported OpenAir Credits** — The feature is controlled on the Workflow settings for the Send OpenAir Credit (Negative Invoice) as NetSuite Credit Memo export workflow in the NetSuite Connector UI. For more information, see  [NetSuite Integration](#).
- Removed **Integrate All Viable Time Entries** — The feature is controlled on the Workflow settings for the Time Entries (Time) export workflow in the NetSuite Connector UI. For more information, see  [NetSuite Integration](#).
- Removed **List view smart rendering (Redesigned User Experience)** — Now a built-in functionality with the Redesigned OpenAir User Experience feature. For more information, see  [User Guide](#).
- Removed **Metavalues in Entity Filters** — Built-in feature.
- Removed **NetSuite Connector Import/Export Settings** — Built-in OpenAir NetSuite Connector feature. For more information, see  [NetSuite Integration](#).
- Removed **OpenAir Revenue Recognition Rules and Transactions with NetSuite Advanced Revenue Management (ARM)** — The feature is controlled by account administrators on the NetSuite Connector administration form. For more information, see  [NetSuite Integration](#).
- Removed **Purchase Requests Integrated on Approval** — Built-in OpenAir NetSuite Connector feature. For more information, see  [NetSuite Integration](#).
- Removed **Resource Compare View** — The resource compare view is available by default when the Resources module is enabled. For more information, see  [Administrator Guide](#).

## October 10, 2020

- Added [REST API](#).
- Added **Project Center Booking Worksheet (Redesigned User Experience)** (deleted in April 9, 2022 OpenAir release — All project center functionality is now available as part of [Project Center](#)).
- Added [Redesigned Administration Module](#)
- Added [Save Invoices Short URL](#)
- Added [Save Payment Terms Internal ID on Invoice Records](#)
- Added [API Access](#) — Existing feature newly documented in this guide.
- Updated [Inline-Editing in List Views](#)
- Updated [Project Center](#)
- Updated Redesigned OpenAir User Experience Phase 2
- Updated Redesigned OpenAir User Experience Phase 3
- Updated [Save and Load List View Configuration](#)
- Removed **Active Directory Integration** — No longer supported.
- Removed **Token-Based Authentication (TBA) for NetSuite Connector** — NetSuite Connector now uses token-based authentication exclusively by default to connect to NetSuite.

- Removed **Use TBA Authentication Exclusively** — NetSuite Connector now uses token-based authentication exclusively by default to connect to NetSuite.

## April 18, 2020

- Added [Date Filters Support for Incurred Vs. Forecast Revenue Recognition Transactions](#)
- Added [Detailed Booking Groupings in the Advanced Booking Worksheet](#)
- Added [Display Incomplete Tasks on Dashboard](#)
- Added **Enforce Column Filter Value Search (Redesigned User Experience)** (Removed in April 10, 2021)
- Added **List view smart rendering (Redesigned User Experience)** (Removed in April 10, 2021)
- Added [Multithreading Support for the Main Integration](#)
- Added [Wrap Text in List View Cells](#)
- Updated **Active Directory Integration** (Removed in October 10, 2020)
- Updated [Business Intelligence Connector](#)
- Updated Redesigned OpenAir User Experience Phase 2

## October 12, 2019

- Added [Project Center](#)
- Added [Your OpenAir Account URLs](#)

## April 13, 2019

- Added Redesigned OpenAir User Experience Phase 3
- Updated Redesigned OpenAir User Experience Phase 2
- Added [Inline-Editing in List Views](#)
- Added **Use TBA Authentication Exclusively** (Removed in October 10, 2020)
- Added [Script Support for HTTPS Methods](#)
- Added [Feature-Specific User Satisfaction Feedback Form](#)

## October 13, 2018

- [Booking Assignment Date Filters](#)
- [Customized User Avatars](#)
- [Decouple RDR Header and RRQ Booking Type](#)
- Redesigned OpenAir User Experience Phase 2

## April 14, 2018

- [Project Crosstab Date Filters](#)

- Publish Shared Reports using BI Connector
- Redesigned OpenAir User Experience
- Save and Load List View Configuration
- Replace Non-Alphanumeric Characters with Underscores in Column Titles and Metadata
- **Verify Password Change** (Removed in October 9, 2021)

## October 14, 2017

- Estimate to Complete (ETC) and Estimate at Completion (EAC) in Project Budgets
- Multithreading Support for On-Demand and Real-Time Export
- Business Intelligence Connector
- Show Billing Rules on Revenue Recognition Forms
- **Token-Based Authentication (TBA) for NetSuite Connector** (Removed in October 10, 2020)
- View Advanced Resource Search Role Permission

## April 15, 2017

- Consolidated Resource Profiles
- Display More Bookings in Advanced Booking Worksheet
- Hide Personal User Data and Hours Remaining in the Timesheet Report
- **OpenAir Help Center** (Removed in October 9, 2021)
- Pagination for the Task Worksheet
- Project Status News Feed
- Query Builder
- "Require Job Code" Setting for Dynamic and Advanced Booking Worksheets
- Skills Approvals

## October 15, 2016

- Advanced Booking Worksheet
- Allow Users to Unapprove Budgets
- Field Order
- Prioritize Recorded Time Over Booked Time for Charge and Revenue Recognition Projection
- New Selector for Customizing List Views
- Project Status Summaries (PSS)
- Resource Demand Request Queues Cannot be Finalized If Availability is Zero

## April 16, 2016

- Customer Contact Information in Project Properties

- Forex Precision Control for Invoices
- Optional Booking on Approved Booking Requests
- User Scripting — Unapprove Event

## October 17, 2015

- **New OpenAir NetSuite Connector UI**
- Increase the Maximum Count of NetSuite Integration Schedule Runs Per Day
- Report Manager and Editor

## April 18, 2015

- Add Multiple Profiles
- Automatically Create Overlapping Timesheet
- Project Budget
- Control Editing Submitted Entities by Approvers via Role Permissions
- CSV Pivot Tables Can Respect User Regional Settings
- Exclude Project from Charge Projections
- Hide the Daily, Weekly, or Monthly Resource Planner Options

## October 18, 2014

- Additional Booking Specific Approvers
- Automating Tax Location
- Bulk Booking Editor
- Close a Task for a Specific Employee for Timesheets and Expenses
- Display the Booking's Requester Name in "Last Name, First Name Middle Name" Format in Reports
- Generate Charges for Partial Periods
- Hide the Project Progress Bar
- User Scripting — Scheduled Scripts
- Set Preferred Landing Page for Projects
- Stop Slow Lists
- Stop Slow Reports
- View All Receipts on One List

## May 17, 2014

- Allow the Owner/Requester/Administrator to Upload Attachments for Approved Objects
- Customization Center

- Inline Editing, Drag-and-Drop Functionality, and Enhanced Gantt Layout
- Negative Charge Stages by Quantity
- Prevent Invoicing and Revenue Recognition Per Customer PO and Agreement
- Report Throttling
- Resource Planner
- Web Services Log Details Report

## February 15, 2014

- Adjust an Approved Expense Report
- Custom Fields Available as Filters in Selected Reports
- Negative Charge Stages
- Phase/Task Filter in "Incurred vs. Forecast Rule"
- Pro-Rate Selected Charges
- Resource Demand Request
- Subtotal and Sort Expense Item Groups on Invoices

## November 16, 2013

- Audit Trail Values Available in Summary Reports
- Auto-Create Bookings for Generic Resources
- Bulk Delete Action Respects Booking Rules
- Disable New, Multiple Bookings Option
- Enable a Booking Type to Exist in All Approval Statuses
- Enable Booking Approval Status in Reports
- Enable Bookings to be Auto-Approved
- Resource Profile Type Access Control
- Show Project Assignment Profiles on Task Assignments
- Time Entries Match Task Assignments

## August 17, 2013

- Script Support for Web Service API Methods

## March 16, 2013

- Automated Search Engine for Booking Creation
- Project Assignment Profiles
- Resource Booking Approvals
- User-Level Outline View

## November 17, 2012

- Loaded Cost Respects Time Entry Date Regardless of Date to Use Value in Reports

## September 15, 2012

- Additional Functionality for Expense Policies on Per-Project Basis
- Display a Zero Sum Tax Rate and Amount on Invoices
- Quick Audit Trail for Custom Fields

## June 15, 2012

- One Project Per Expense Report

## May 12, 2012

- Select Different Currencies for Loaded Cost Overrides

## March 17, 2012

- Adjust Planned/Assigned Hours Based on Actual Work
- Apply Phase Filtering in Time Billing Rules
- User Scripting — Form Scripts
- Prevent Invoicing and Revenue Recognition on a Per-Project Basis

## January 21, 2012

- Automatically Add New Users to Assignment Groups
- Conditional Dropdown Custom Fields
- Portfolio Projects and Subordinate Projects
- New "Booking Type" Filter in Revenue Recognition Rule

## November 19, 2011

- Advanced Agreement and Customer PO Balance Calculation

## September 17, 2011

- Configure Time Entry Rounding at the User Level



- Enhanced Workflow Process Invoice Submission and Revenue Container Creation

## July 16, 2011

- Credit and Rebill Functionality for Invoices

## January 28, 2011

- Custom Email Notifications

## January 22, 2011

- Additional Option for Invoice Layout Terminology Overrides

## September 18, 2010

- Define Charges to Recognize in "As Billed" Revenue Recognition Rules
- Exclude Specific Values from Filters in Reports
- Multiple Schedule Exceptions Per Day by Time Off Requests
- Organize Saved Reports in Specified Folder

## July 17, 2010

- Allow an Approver to Edit a Submitted Invoice
- Optionally View and Assign Revenue Hours for Recognition Transactions

## May 21, 2010

- View Tasks for Inactive Projects in Task List View

## May 15, 2010

- Proxy Confirmations

## January 23, 2010

- Automatically Receive PDF Attachments of Approved Timesheets and Expense upon Approval
- Self-Rejection of Timesheets

## November 21, 2009

- Report on More than 31 Days When Reporting on Daily Time Periods

## September 19, 2009

- Single Sign-On Integration Leveraging SAML

## July 18, 2009

- Accounting Period Functionality
- Assign Project Job Codes for Users on a Per Project Basis

## June 9, 2009

- Enable Integration with NetSuite

## May 16, 2009

- Restrict Specific Custom Fields from Being Copied

## March 21, 2009

- Display Contacts in “Last Name, First Name” Format in Drop-down Menus

## January 17, 2009

- Line Item Rejection in Timesheets
- Project Hierarchy Settings in User Detail Report

## November 22, 2008

- **Active Directory Integration** (Removed October 10, 2020)

## September 13, 2008

- Pick List Custom Field
- Default Options on Task Assignment
- Prevent Entry of Future Time at the User Level

- Time Entry Grid Filtering

## August 7, 2008

- User-Defined Reporting Currencies

## July 19, 2008

- Use Booking Request Grid to Enter Multiple Requests That Are Available

## May 17, 2008

- Email Scheduled Reports to a Contact from the Contacts List
- Foreign Currency Receipts in Expense Grid
- Suppress Email Notifications or Add Addresses to Notifications

## December 10, 2007

- Overlapping Timesheets and Envelopes at the Role Level

## September 13, 2007

- Allocation Grid Custom Field

## August 31, 2007

- Hide Divider Sections on Forms

## April 2, 2007

- Edit Exchange Cross Rates

## August 24, 2006

- Set the Timesheet Duration At the User Level

## June 15, 2005

- Unexport Records from a Specific Application by UI

## August 26, 2004

- Calculate Remaining Hours Using Approved Hours Instead of Worked Hours

## October 20, 2003

- Use Zero Hours Rather than Planned Hours for Users' "Hours Remaining" Estimates

## February 12, 2003

- Filter Timesheet Report by Project

## August 12, 2002

- Use Days Instead of Hours for All Time Entries